

# Project Management Challenges in Global Salesforce CRM Implementation

Submitted in partial fulfillment of the requirement for  
**Executive Masters in Business Administration (EMBA)**  
**Operations Management**

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# Applied Business Research On Project Management Challenges in the Implementation of a Global Salesforce CRM Platform

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**Submitted By:**  
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umber]  
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# Executive Summary

- ❖ **Navigating Global CRM Implementation Challenges:** Our study is dedicated to unraveling the complexities inherent in the implementation of a Global Salesforce CRM platform.
- ❖ **Key Project Management Challenges:** Through rigorous analysis, we've uncovered and dissected significant challenges including stakeholder engagement, change management, data compliance, cultural nuances, and the impact of political stability.
- ❖ **Guiding Success with Actionable Insights:** The core purpose of this report is to equip organizations with actionable recommendations that foster effective project management and pave the way for a triumphant CRM implementation journey.

Focus Company selected for Study and Collection of Primary Data  
**[REDACTED\_Firm\_Name] ([REDACTED\_Project\_Name] Project)**

# Insights on [REDACTED\_Project\_Name] Project

## Company Information

[REDACTED\_Firm\_Name]

## About [REDACTED\_Project\_Name] and Its Role

- ❖ [REDACTED\_Firm\_Name]'s project "[REDACTED\_Project\_Name]" is a Deloitte Global sponsored Internal Project.
- ❖ [REDACTED\_Project\_Name] aims to streamline customer interactions, enhance data management, and improve customer satisfaction.
- ❖ Role: Utilizing Salesforce CRM for improved customer relationship management and standardized processes across regions.

## Problem Statement

- ❖ Addressing challenges in Global Salesforce CRM implementation is key.

## Significance of the Study

- ❖ Successful CRM implementation crucial for effective customer management.
- ❖ Addressing challenges leads to strategic benefits.

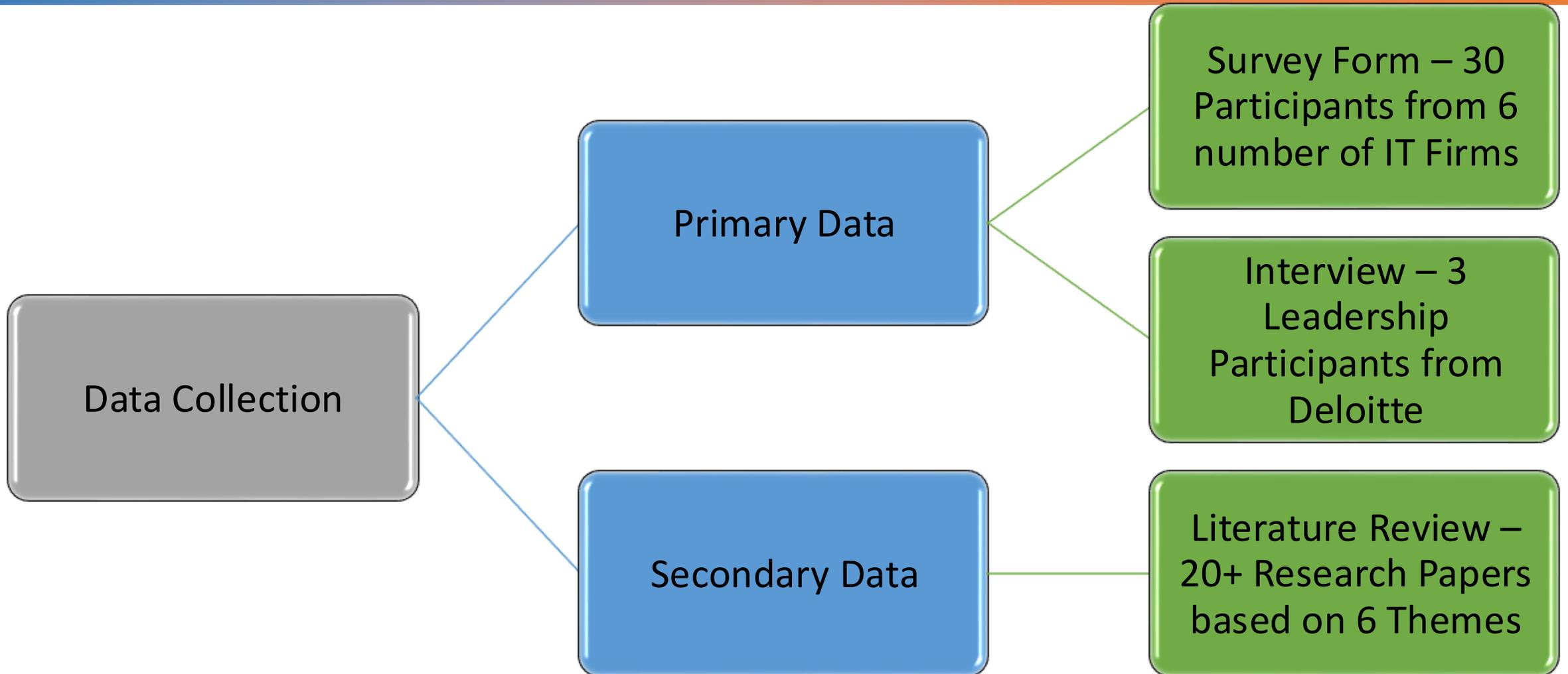
## Research Objectives

- ❖ Identify and analyze Global Scale IT Project implementation challenges.
- ❖ Evaluate impact of data compliance, stakeholder engagement, etc.
- ❖ Assess long-term benefits and ROI.
- ❖ Identify critical success factors.
- ❖ Provide actionable recommendations.

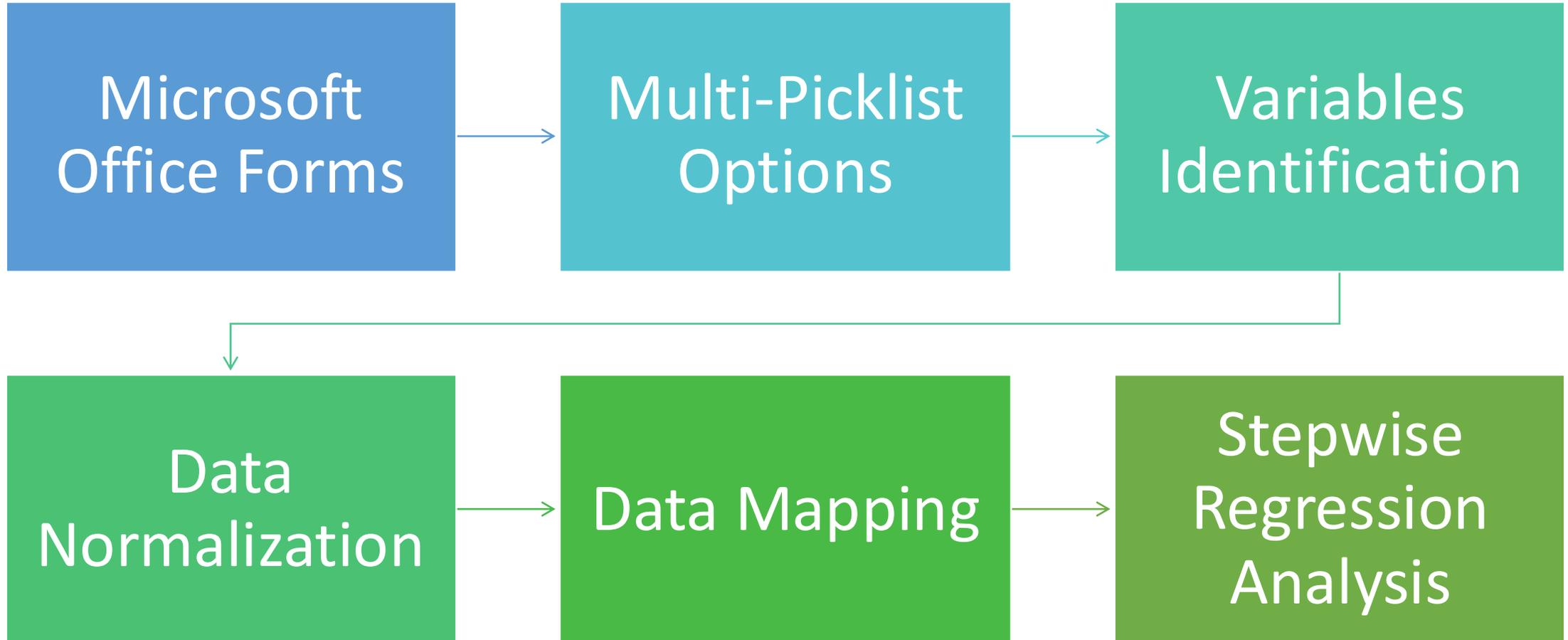
## Scope and Limitations

- ❖ Findings applicable to consulting and related IT Industries.

# Data Collection



# Primary Data – Survey Data Analysis



# Variables

## Dependent Variable

- Measure the Success

## Independent Variables

- Project Management Challenges
- Team Engagement Obstacles
- Knowledge Transitioning Strategies
- Integration Difficulties
- Change Management Effectiveness
- Resource Management Challenges
- Communication and Coordination Levels

# Hypothesis

## Null Hypothesis (H<sub>0</sub>)

- There is no significant relationship between the independent variables (Project Management Challenges, Team Engagement Obstacles, Knowledge Transitioning Strategies, Integration Difficulties, Change Management Effectiveness, Resource Management Challenges, Communication and Coordination Levels) and the dependent variable (Measure of Success).

## Alternative Hypothesis (H<sub>a</sub>)

- There is a significant relationship between at least one of the independent variables (Project Management Challenges, Team Engagement Obstacles, Knowledge Transitioning Strategies, Integration Difficulties, Change Management Effectiveness, Resource Management Challenges, Communication and Coordination Levels) and the dependent variable (Measure of Success).

# Stepwise Regression Analysis

Step 1

	<i>Coefficients</i>	<i>Standard Error</i>	<i>t Stat</i>	<i>P-value</i>	<i>Impact</i>
Intercept	0.98960419	0.377177002	2.623712961	0.0089824	
ProjectManagementChallenges	-0.144384555	0.018873562	-7.6500957	1.15802E-13	Significant
TeamEngagementObstacles	-0.288296039	0.043833923	-6.577007449	1.28883E-10	Significant
KnowledgeTransitioningStrategies	-0.335940098	0.050981455	-6.58945686	1.19373E-10	Significant
IntegrationDifficulties	-0.333672178	0.05936306	-5.620872318	3.27252E-08	Significant
ChangeManagementEffectiveness	-0.00246608	0.063908708	-0.03858755	0.969235719	Not Statistically Significant
ResourceManagementChallenges	-0.053820534	0.076201552	-0.706291846	0.480358875	Not Statistically Significant
CommunicationandCoordinationLevels	0.040567707	0.05391099	0.752494199	0.452133041	Not Statistically Significant



Step 2

	<i>Coefficients</i>	<i>Standard Error</i>	<i>t Stat</i>	<i>P-value</i>	<i>Impact</i>
Intercept	0.980889318	0.301763242	3.250526184	0.001234972	
ProjectManagementChallenges	-0.144448258	0.018781154	-7.691127841	8.68553E-14	Significant
TeamEngagementObstacles	-0.288352114	0.043763068	-6.588937331	1.19516E-10	Significant
KnowledgeTransitioningStrategies	-0.336099264	0.050760078	-6.621330734	9.78516E-11	Significant
IntegrationDifficulties	-0.333873528	0.059070167	-5.652151401	2.75786E-08	Significant
ResourceManagementChallenges	-0.05368106	0.076034537	-0.706008903	0.480533896	Not Statistically Significant
CommunicationandCoordinationLevels	0.04005944	0.052221334	0.76710871	0.443403692	Not Statistically Significant

# Stepwise Regression Analysis

Step 3

	<i>Coefficients</i>	<i>Standard Error</i>	<i>t Stat</i>	<i>P-value</i>	<i>Impact</i>
Intercept	0.815989995	0.190969024	4.272891889	2.33781E-05	
ProjectManagementChallenges	-0.144500468	0.018770964	-7.69808465	8.24689E-14	Significant
TeamEngagementObstacles	-0.288266421	0.043739493	-6.59052947	1.18113E-10	Significant
KnowledgeTransitioningStrategies	-0.336881719	0.050720835	-6.641880335	8.59804E-11	Significant
IntegrationDifficulties	-0.334683442	0.059027439	-5.669963766	2.49968E-08	Significant
CommunicationandCoordinationLevels	0.031858216	0.050885723	0.626073757	0.531571133	Not Statistically Significant



Step 4

	<i>Coefficients</i>	<i>Standard Error</i>	<i>t Stat</i>	<i>P-value</i>	<i>Impact</i>
Intercept	0.928856249	0.062964211	14.75213046	9.52403E-41	
ProjectManagementChallenges	-0.144534798	0.018758738	-7.704931927	7.83605E-14	Significant
TeamEngagementObstacles	-0.287945437	0.043708189	-6.587905947	1.198E-10	Significant
KnowledgeTransitioningStrategies	-0.335881054	0.050662843	-6.62973163	9.2516E-11	Significant
IntegrationDifficulties	-0.335586774	0.05897162	-5.690648723	2.22969E-08	Significant

# Primary Data - Leadership Interviews



Jackson, Angela  
*Managing Director -  
PMO Delivery*



Davis, Eric D  
*Senior Manager,  
Technology Ops - PMO*



Bonner-Witt, Katrina  
*Managing Director,  
Global CRM*

## 1. Stakeholder Governance Success

- ❖ Benefits of early governance setup
- ❖ Decisions, communication, and efficiency

## 2. Financial Success and ROI Measurement

- ❖ Measuring success through value delivery
- ❖ Value-driven measurement
- ❖ COVID impact on value delivery

## 3. Addressing Cultural Differences and Political Stability

- ❖ Proactive risk mitigation
- ❖ Adapting to geopolitical impacts
- ❖ COVID's challenges - Adjustments and impact

# Secondary Data – Literature Review

## Project Management Challenges

- 1.Cloud-Based Outsourcing Framework for Efficient IT Project Management Practices.
- 2.Investigative analysis of CRM system implementation and the challenges attached to its integration into the existing ERP system.
- 3.Agility and system documentation in large-scale enterprise system projects: a knowledge management perspective.
- 4.AN ANALYSIS OF THE CAUSES AND CONSEQUENCES OF THE INFORMATION GAP IN IT PROJECTS.

## CRM Adoption Challenges

- 1.Contemporary challenges in CRM technology adoption: a multichannel view.
- 2.CRM ADOPTION FACTORS IN THE GAMING INDUSTRY.
- 3.The impact of firm-level and project-level IT capabilities on CRM system quality and organizational productivity.
- 4.Social CRM in SMEs: A Systematic Literature Review.

## Change Management

- 1.The Importance of Governance in Digital Transformation: A Case Study of e-CRM Implementation in a Malaysian Petrochemicals Company.
- 2.Formal modeling and verification of a service composition approach in the social customer relationship management system.

## Financial and ROI Measurement

- 1.Analyzing the Diffusion of Global Customer Relationship Management: A Cross-Regional Modeling Framework.
- 2.Implementation of telecommunications cross-industry collaboration through agile project management.

## Cultural Differences and Political Stability

- 1.Business Environment, CRM, and Sustainable Performance of Construction Industry in New Zealand: A Linear Regression Model.
- 2.Research model for measuring the impact of customer relationship management (CRM) on performance indicators.
- 3.A Conceptual Model of Factors Influencing Customer Relationship Management in Global Software Development: A Client Perspective.
- 4.DIGITAL TRANSFORMATION OF CRM STRATEGIES: ANALYSIS OF POTENTIAL AND INNOVATIVE STRATEGIES.

## Green Human Resource Management and CSR

- 1.Green human resource management, corporate social responsibility and customer relationship management: relationship analysis in the Brazilian context.

# Recommendations based on the Findings.



- Enhancing Stakeholder Engagement

- Developing Change Management Framework

- Ensuring Data Compliance and Governance

- Addressing Cultural Differences

- Monitoring Political Stability

# Feasibility and Action Plan for Successful Implementation



Clear Objectives



Resource Allocation



Realistic Timeline



Stakeholder Involvement



Monitoring and Evaluation

# Strategic Impact



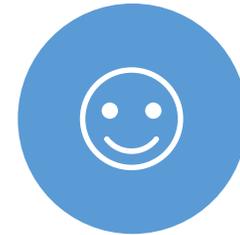
**EMPHASIZE THE  
BENEFITS FOR THE  
ORGANIZATION**



**IMPROVED  
OPERATIONAL  
EFFICIENCY**



**ENHANCED DECISION-  
MAKING**



**ELEVATED CUSTOMER  
SATISFACTION**



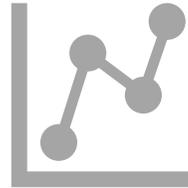
**COMPETITIVE  
ADVANTAGE**

# Limitations of the Study



## Scope and Generalizability

The study centered around the unique context of Deloitte Global, which may limit the direct applicability of its findings to other organizations



## Data Collection Limitations

The data collected for the study primarily relied on self-reported information through surveys, interviews, and case studies.



## Time Constraints

The study was conducted within a specific timeframe, which may have constrained the depth and breadth of the analysis.

# Key Learnings

01

**Recognizing  
Stakeholder  
Engagement and  
Change  
Management**

02

**Understanding  
the Impact of  
Cultural  
Differences and  
Political Stability**

03

**Emphasizing  
Data Compliance  
and Governance**

04

**Addressing  
Challenges and  
Opportunities in  
Global Account  
Alignment**

05

**Utilizing Mixed-  
Methods  
Research**

# Future Scope



**Investigating Long-Term Sustainability**



**Exploring Emerging Technologies**



**Conducting Comparative Studies**



**Examining Organizational Culture**



**Analyzing Employee Engagement and Productivity**

# Summary of Key Insights

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- ❖ **Project Management Challenges:** Budget, technical issues, and engagement obstacles identified.
- ❖ **Team Engagement and Stability:** Clear roles, communication, and resource allocation crucial.
- ❖ **Knowledge Transition and Restructuring:** Effective strategies for knowledge sharing and training.
- ❖ **Challenges in Data Modeling and Integration:** Data synchronization and compatibility issues faced.
- ❖ **Metrics for Success Measurement:** ROI, customer satisfaction, and project deliverables key indicators.
- ❖ **Long-Term Benefits:** Improved sales, data accuracy, streamlined processes post-implementation.
- ❖ **Cultural Differences:** Positive and negative influences of cultural diversity acknowledged.
- ❖ **Political Stability:** Varies in impact, influenced by political factors across regions.
- ❖ **Best Practices:** Clear goals, stakeholder engagement, change management, and efficient resource use.
- ❖ **Change Agents and Stakeholder Engagement:** Change agents and stakeholder involvement are pivotal.





# Questions and Discussion



# Thank You