

CRM Beyond Technology: Aligning People, Processes, and Platforms for Business Growth

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Abstract: However, CRM is often treated solely as a software purchase decision. Research shows that platform capability alone rarely delivers the expected levels of customer, operational, and financial performance. In this paper, we synthesize the CRM literature to provide a conceptual framework of the interactions between people, processes, and platforms (4 P) in successful CRM. We build on the early literature on CRM, critical success factors, digitalization, and AI-empowered CRM and develop a conceptual integrative alignment framework linking the organization of people-capabilities, customer-facing processes, and enterprise CRM platforms to business value through planned alignment as a mediating mechanism. Finally, we propose a five-level CRM alignment maturity model, a layered CRM reference architecture and a CRM critical success factors taxonomy, which are based on our survey of the CRM literature. The contributions of the paper are conceptual. We take an eclectic set of partial CRM implementation frameworks and consolidate them into a single operational framework for empirical testing, and into a concept that practitioners can use as a tool for auditing their CRM implementation. Relative to prior research on CRM implementation frameworks, this article examines the framework's breadth and depth of integration, its boundary condition and its prospect for future empirical investigations.

Keywords: CRM Strategy; Customer Experience; Digital Transformation; Automation; Enterprise CRM; Business Process Improvement; Organizational Alignment

1. Introduction

CRM has evolved from back office record keeping to a planned organizational competence that enables firms to acquire, service and retain customers in increasingly fragmented physical and digital channels. Arguably the most commonly cited definition is that CRM is not a single application but a combination of people, processes and technology that together create and sustain profitable customer relationships (Chen & Popovich, 2003). Despite the converging evidence from over two decades of research, CRM is frequently initiated and assigned to be managed as a technology project, and the focus in early planning is on vendor selection, licensing and platforms. In practice, little attention is paid to the organizational conditions needed to convert the platform into something of value to the customer (Abdul Hamid et al., 2022).

This gap matters because there are well-established and large costs to treating CRM as only a technical exercise. There is also considerable evidence that the majority of CRM projects fail to deliver business value. These failures are attributed more to poor alignment between the deployed CRM software and the company's strategy, insufficient governance of its data assets, ineffective change management practices and processes that do not lend themselves to how cross-functional teams work with

clients (Abdul Hamid et al., 2022; Roberts, Liu, & Hazard, 2005). In addition, Reinartz, Krafft, and Hoyer (2004) observe that the performance of CRM on business results is much more dependent on the implementation of its underlying customer-facing processes than on the software-based CRM system itself. All together, this implies that platform capability is necessary but not sufficient for success with CRM and that firms need a more integrative way of thinking about CRM investment than the technology-first perspective allows.

Simultaneously, the technology layer of CRM systems experienced an important transition as modern CRM systems leverage new technological advancements such as artificial intelligence, predictive analytics, robotic process automation, and real-time integration with the ERP and marketing systems (Chatterjee et al., 2022; Gil-Gomez et al., 2020) to enable the full potential of well-aligned CRM initiatives. But they also increase the cost of misalignment: an AI-augmented CRM platform over poorly governed data and unclear process ownership tends to automate and scale the dysfunction. Understanding how to align the organizational and the technological aspects of CRM is not a mere technical implementation detail but a core calculated question for scholars and practitioners alike.

This paper formulates a conceptual synthesis on the CRM literature with three interrelated objectives. First, this paper reviews and synthesizes the existing literature on the people, process and platform dimensions of CRM and

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the emerging academic research on CRM-enabled CX and digital transformation. Second, it proposes an integrative alignment framework that explains the role of planned alignment as a mediating mechanism for this body of literature in relation to concrete business benefits and proposes a CRM alignment maturity model and a layered CRM reference architecture. Third, this article positions the proposed framework in the body of CRM implementation models to specify its theoretical contribution and its circumstantial usefulness in the body of literature.

The paper proceeds. Section 2 reviews four streams of CRM literature: the evolution of CRM as a construct, the people dimension of CRM, the process dimension of CRM, and the CRM platform/technology dimension. The section concludes with a mapping of the identified gaps to the proposed framework. Section 3 details the narrative-review methodology used to structure the literature. Section 4 presents the framework, maturity model, architecture, taxonomy of CSFs, and the comparison with existing maturity models and frameworks. Finally, Section 5 discusses the theoretical and practical implications, limitations, and boundary conditions of the framework. In section 6, the article closes with suggestions for future empirical research.

2. Literature Review

2.1 The Evolution of CRM as a Strategic Construct

Early CRM research suffered from definitional ambiguity, whether CRM was an instance of a class of technologies, a marketing practice or strategy, or a management philosophy. Zablah, Bellenger, and Johnston (2004) note that the literature treated CRM variously as a process, strategy, philosophy, capability, or technology, leading to contradictory findings and a failure to build on each other to develop cumulative theory. An amalgamation of these definitions leads to a conclusion that CRM is a process of using customer information on an active basis to build and manage profitable relationships with Customers.

One of the more enduring responses to the lack of consensus among definitions was offered by Chen and Popovich (2003) who model CRM as the interaction of people, process, and technology and who explain through case study the necessity of viewing the three dimensions in concert in order to affect a successful CRM initiative. Payne and Frow (2005) build on Chen and Popovich's approach and attempt to arrive at a framework for the development of a CRM strategy centered on five interacting processes (strategy development, value creation, multichannel integration, information management, and performance assessment) representing CRM from a cross-functional planned orientation rather than as a sales or marketing function. One of the more

important contributions of this framing is that it shifts the decision to invest in CRM from an IT procurement decision to an enterprise strategy decision, which is the basis for the later framework proposed in this paper.

The empirical evidence for the planned view of CRM is provided by Verhoef (2003). For loyalty activities such as loyalty programs, direct mail and relationship-specific communication, relationship- and affect-related dimensions such as trust and commitment (rather than technology adoption) moderate the effect of CRM on customer retention and share-of-wallet. The calculated and empirical literature presented in this section provides the conceptual foundation for the present paper: that CRM effectiveness is a joint function of organizational and technological factors and that CRM research narrowly investigating the technology layer without accounting for people and process is unlikely to explain variance in CRM outcomes.

2.2 The People Dimension: Leadership, Culture, and Change

Top-management sponsorship and organizational culture are two of the best predictors of CRM program success in CRM implementation research. As Chen and Popovich (2003) suggest, top-management commitment is a precondition for CRM adoption. Top management must do more than approve a budget, but also communicate calculated intent throughout the organization, resolve disputes between departments over ownership of customer information and exert continued pressure during the multi-year implementation cycles typical of most CRM programs. In a review of CRM adoption in SMEs, Abdul Hamid, Alshehha, Abdullah, and Mohamed (2022) conclude that senior leadership sponsorship and change management comprise the two most important success factors. They suggest that human resource management practices provide a determinant for whether the intended use of CRM by front-line employees is realized.

The people dimension can include market and knowledge orientation. Researchers have found market orientation and knowledge management capability, defined as the ability of an organization to generate, share, and use knowledge about customers, to have a stronger impact on the performance of CRM than the technological sophistication of CRM systems. The influence of knowledge management capability has also led researchers to suggest investing in staff selection, training and motivation rather than in other CRM capabilities. This is consistent with Roberts, Liu and Hazard (2005)'s review of empirical CRM research that finds technology a necessary but not sufficient enabler of CRM success. Instead, the researchers believe, human factors such as

staff skills, incentives and willingness to change established working practices are more important.

In a systematic literature review of CRM critical success factors, Jabado and Jallouli (2023) note that human and organizational factors have remained salient over decades of CRM research, even as the technology has transitioned from early sales-force-automation systems to new AI-embedded CRM systems. This suggests that the people side of CRM is not a mere implementation problem that fades away, but an organizational capability that needs to be maintained.

2.3 The Process Dimension: Customer Journeys, Governance, and Data Quality

The second area of CRM research as an academic field is process design, that is, the design of the customer-facing processes, the cross-functional flow of data, and the performance metrics associated with the process. Reinartz, Krafft, and Hoyer (2004) develop and empirically test a process model of CRM with the initiation, maintenance, and termination of the customer relationship as a theoretical basis. They find a positive relationship between the level of CRM process implementation and economic performance, which is moderated by industry and technology-human activity alignment. This suggests that the value of CRM is due, not just to the presence of CRM processes, but their design.

The second major process theme is data quality and governance. Abdul Hamid et al. (2022) place customer data quality and availability as a separate critical success factor from technology selection. Thus, enterprise systems scholars likewise cite the challenge of managing duplicate, partial, or variant definitions of customer data across systems as a governance and process problem as much as a technical one. For instance, establishing a canonical definition of a customer or an order across customer relationship management (CRM) and enterprise resource planning (ERP) systems is framed as requiring cross functional agreement over data ownership and quality standards prior to the deployment of any integration technologies (IBM, 2025).

Similarly, process-oriented CRM research is addressing the importance of cross-departmental capabilities, as opposed to just departmental process optimization. Work by Onaghinor, Uzozie and Esan (2022) and others investigating data-driven project and supply-chain management is among work conducted in operations management that sees customer-facing performance as the emergent property of a coordinated, cross-functional sequence of processes rather than the sum of optimized processes in departments. From this perspective, CRM process design should ensure that the sales, marketing and service functions have a shared definition of customer

value and a shared cadence of performance management review.

2.4 The Platform Dimension: Architecture, Integration, and Automation

The technology element of CRM extends back to the early sales-force-automation and call-center applications. According to Gil-Gomez, Guerola-Navarro, Oltra-Badenes, and Lozano-Quilis (2020) CRM is now viewed as a component of digital transformation, "green IT" and an infrastructure for sustainable business models that integrates sales, marketing, and service data for customer knowledge management and sustainability purposes. Chatterjee, Chaudhuri and Vrontis (2022) found that the embedding of AI in CRM shifts the nature of relationship management via predictive personalization and real-time response, but that the impact on the organization is driven by changes to processes and governance that complement the AI-CRM capability rather than the capability itself.

Architectural issues are more relevant as CRM solutions are increasingly integrated with other enterprise systems. Practitioner and applied research focusing on the integration of ERP and CRM includes layering different reference architectures (data, integration, business logic and presentation), employing event-driven architecture or API-first integration pattern in order to maintain a single consistent view of the customer between different platforms while allowing them to change independently (IBM, 2025). This architecture is represented by the four-layer reference model of Figure 4 of this paper, which depicts the general model of an enterprise CRM context.

In two papers (Naim et al., 2024; Jabbari and Lamari, 2024), it was noted that creating a better customer experience in the context of digital CRM technologies such as chatbots, predictive analytics, and automated personalization requires augmenting rather than replacing human-mediated service delivery, leading to better customer satisfaction and retention. However, the challenges around data security, information overload, and organizational inertia, i.e., challenges that remain process and people ones even though they are triggered by technology adoption, are not yet fully resolved in technology-led CRM initiatives. This underscores the central message of this paper: platform capability, however advanced, operates within, and is constrained by, the organizational conditions established by the people and process dimensions.

2.5 Research Gap

While these works overall provide strong evidence that all three dimensions of CRM success are interdependent and non-substitutable, there is still substantial fragmentation along disciplinary lines. Organizational behavior-oriented literature on CRM, including leadership and change

management literature, rarely cite electronic architecture studies on CRM-ERP integration. Similarly, literature on AI-enabled CRM and digital transformation often treats organizational readiness as a control variable rather than a key focus of investigation. While critical success factor studies such as Abdul Hamid et al. (2022) and Jabado and Jallouli (2023) provide a list of factors, they do not discuss their relationships or how organizations can assess their alignment maturity.

This creates a practical problem for organizations proposing or auditing CRM projects as they may find access to long lists of success factors and increasingly advanced architectural guidance, but comparatively little integrative, diagnostic framework linking planned alignment, organizational capability, process design and platform architecture into a unified model that can be applied consistently across a range of contexts. The framework presented here in Section 4 of the paper seeks to address this gap.

3. Methodology

Although this paper takes the form of a conceptual narrative review, it does not use empirical or systematic reviews to test hypotheses posed on primary data. The aim is to build an integrative conceptual framework from an established but fragmented body of CRM literature. This is the appropriate and accepted way to build theory in both management and information-systems research, especially when bridging three lanes of research (organizational behavior, process management, and enterprise architecture) that largely ran in parallel.

3.1 Review Scope and Source Selection

Relevant peer-reviewed academic articles, conference proceedings and applied industry articles on CRM were reviewed, covering the topics of CRM critical success factors, CRM-organization alignment, CRM-enabled customer experience, and CRM system architecture and integration. Literature searches were conducted on academic databases and publisher websites focusing on Scopus-indexed and Web of Science-indexed academic journals and conference proceedings, Springer, ScienceDirect and Taylor & Francis outlets. Search terms were: "CRM", "customer relationship management", "critical success factors", "organizational alignment", "digital transformation", "customer experience" and "enterprise architecture". Combinations of these were used. Priority was given to prominent and highly cited CRM literature defining the people-process-technology concept in favor of more recent literature from 2020 to 2024 discussing AI-enabled and digitally transformed CRM systems to leverage the literature's foundation while incorporating the latest developments.

3.2 Thematic Coding and Synthesis

The sources were then thematically coded against the three dimensions conceptualized by Chen and Popovich (2003): people, process, and technology. As customer experience is an outcome variable which relates to multiple dimensions, it was coded separately. Overall, themes within each dimension were grouped into several sub-themes such as leadership sponsorship and change management in the people dimension, data governance and cross-functional workflow design in the process dimension, and architecture, integration, and automation in the platform dimension. This coding process is illustrated in Figure 1, which summarizes the five-step review process used in this study.

Figure 1. Narrative-Review Methodology Applied in This Study

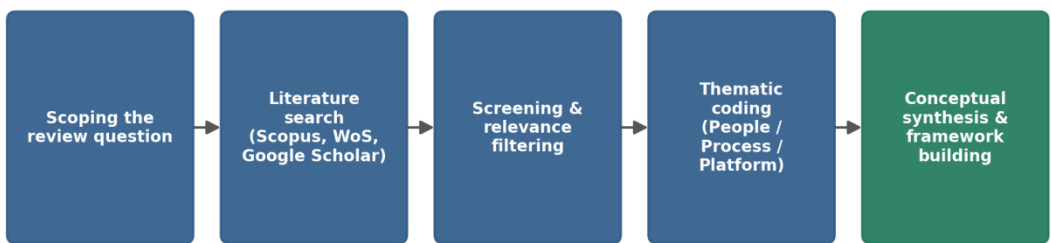


Figure 1. Narrative-review methodology applied in this study, from question scoping through conceptual synthesis.

3.3 Framework Development Approach

The results of the thematic analysis were integrated into one diagram (presented in Section 4 as Figure 2) based on the iterative construct comparison. Wherever two or more authors referred to substantively the same mechanism

using different terminology (e.g. "organizational readiness" vs. "change management capability"), one construct was proposed and included in the theoretical model. However, wherever two authors disagreed concerning the importance of a driver (e.g. whether

technology or organization culture is the stronger driver of CRM success), this disagreement was preserved in the discussion (Section 5) given the conceptual and non-empirical nature of the contribution.

The proposed framework's CRM alignment maturity model (figure 3) and layered reference architecture (figure 4) were also synthesized from findings regarding staged implementation from the CRM critical-success-factor literature and architectural patterns from the CRM-ERP integration and enterprise-architecture literature. Table 1 in section 4 summarizes the scope of the literature supporting each of these elements of the proposed framework.

3.4 Limitations of the Method

This particular version does not allow for statistical modeling of the relative strength or prevalence of these factors and should be viewed as a theoretically-grounded practitioner framework, rather than an empirically-proven predictive model. In fact, we stress this lack of empirical validation in Section 5 and suggest a research agenda.

4. Proposed Framework and Comparative Analysis

This section synthesizes the literature identified in Section 2 in a conceptual CRM alignment framework, which is supported by three conceptual artifacts: a maturity model, a reference architecture, and a critical-success-factor taxonomy. Finally, this section compares the framework to three seminal prior CRM models to clarify its position in the literature.

4.1 The People-Process-Platform Alignment Framework

The proposed theoretical model (Figure 2) is centered on the concept of calculated alignment: the degree to which the decisions taken in the people, process and platform dimensions can ultimately be traced back to a common understanding of customer value and business goals. This positioning is also supported by the finding in the literature that technology, process design and organizational capability independently correlate with CRM success, and that the best performers show alignment across all three dimensions, not just one (Chen & Popovich, 2003; Payne & Frow, 2005; Roberts, Liu & Hazard, 2005).

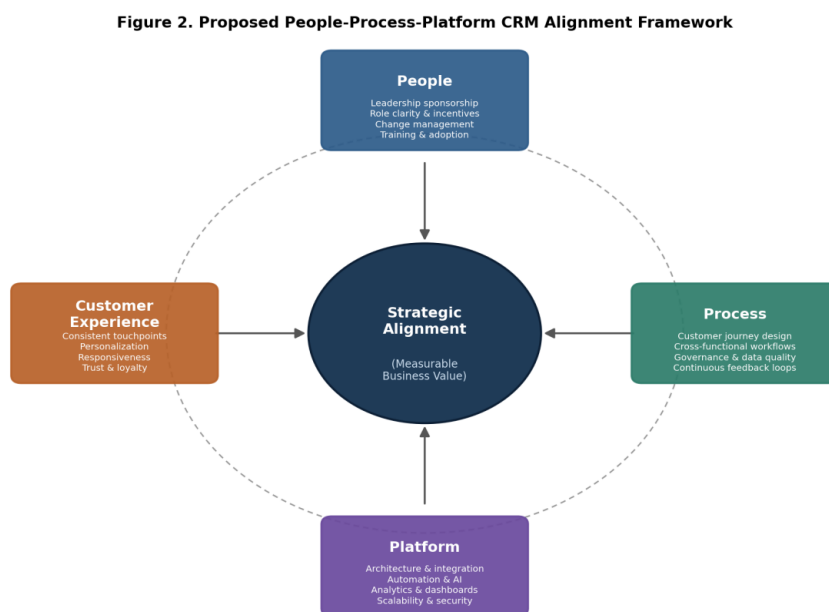


Figure 2. Proposed People-Process-Platform CRM alignment framework, with strategic alignment as the connective mechanism linking organizational and technological dimensions to customer experience and business value.

Customer experience serves as an input and an output. In other words, customer experience which is consistent, personalized and responsive, is a design target of the people, process and platform dimensions. It also provides important feedback for fine-tuning processes (dashed feedback ring in Figure 2). Our framework is consistent

with Verhoef's (2003) finding that CRM has a mediating effect on customer retention in services through relational and affective factors. It is also consistent with Naim, Rajuddin, and Ansyori's (2024) finding that digital CRM tools improve customer experience by improving rather than replacing human-mediated service quality.

Table 2 operationalizes each component of the framework as a diagnostic question, together with illustrative practices that organizations can use to assess their own alignment status.

Framework Component	Core Question It Answers	Illustrative Practices
People	Does the organization have the leadership commitment, skills, and incentives to sustain CRM-driven ways of working?	Executive sponsorship; role-based training; incentive redesign; change-management cadence
Process	Are customer-facing workflows, data governance, and performance metrics designed cross-functionally rather than by department?	Shared customer-journey maps; data-quality standards; cross-functional KPI reviews
Platform	Does the CRM architecture support current needs and scale to future integration, automation, and analytics requirements?	Layered architecture; API-first integration; automation of repetitive tasks; analytics dashboards
Strategic Alignment (core)	Are people, process, and platform decisions all traceable to the same customer-value strategy?	Unified CRM roadmap; joint governance board spanning IT, marketing, sales, and service
Customer Experience (outcome)	Do customers experience consistent, personalized, and responsive interactions across touchpoints?	Omnichannel consistency; personalization; complaint/feedback closed-loop processes

Table 2. Operationalization of the proposed framework's components as diagnostic questions and illustrative practices.

4.2 A CRM Alignment Maturity Model

Given that CRM alignment is seldom achieved in a single implementation cycle, a five-stage model of maturity (Figure 3) is derived from staged-implementation research in the critical-success-factor and digital-transformation literature (Abdul Hamid et al., 2022; Roberts et al., 2005; Gil-Gomez et al., 2020). This begins with the fragmentation stage, in which separate departmental tools are adopted and a unified customer view is not established. These are departments,

integrated, aligned, and adaptive. Departmental and integrated refer respectively to the departmental and cross-departmental states. The aligned state is where governance, incentives and cross-functional process are aligned with the benefits of CRM. The adaptive state is the state of a company whose AI-augmented, real-time capability is continuously re-tuned to strategy and customer need. It is the state most closely associated in the recent literature with AI-embedded CRM systems (Chatterjee, Chaudhuri, & Vrontis, 2022).

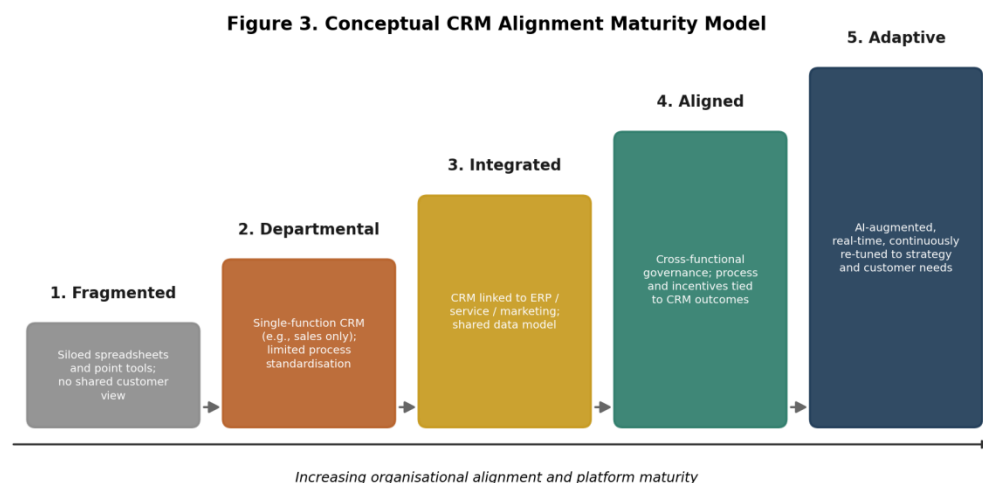


Figure 3. Conceptual CRM alignment maturity model, from fragmented tooling to adaptive, AI-augmented alignment.

This maturity model was intended to be a diagnostic heuristic rather than a deterministic sequence, since, as

the literature suggests, organizations can and do simultaneously exist at different maturity levels along the

three dimensions of people, process, and platform (e.g., a CRM implementation that is technologically advanced while at the same time organizationally decentralized). This issue is further elaborated in Section 5.

4.3 A Layered Reference Architecture for Enterprise CRM

In Figure 4, we summarized architectural knowledge from the enterprise-integration and CRM-ERP literatures into a four-layer reference architecture: a presentation layer for

user-oriented CRM applications, an integration layer with APIs, event brokers, and automation connectors to adjacent applications, a business-logic layer for workflow automation, business rules, AI/ML-powered scoring, and routing, and a data-architecture layer for customer master data and governance controls. Correspondingly, this layered architecture reflects the core architectural principle of describing applied CRM-ERP integration as the canonical data layer governed to deliver trustworthy business automation and analytics (IBM, 2025).

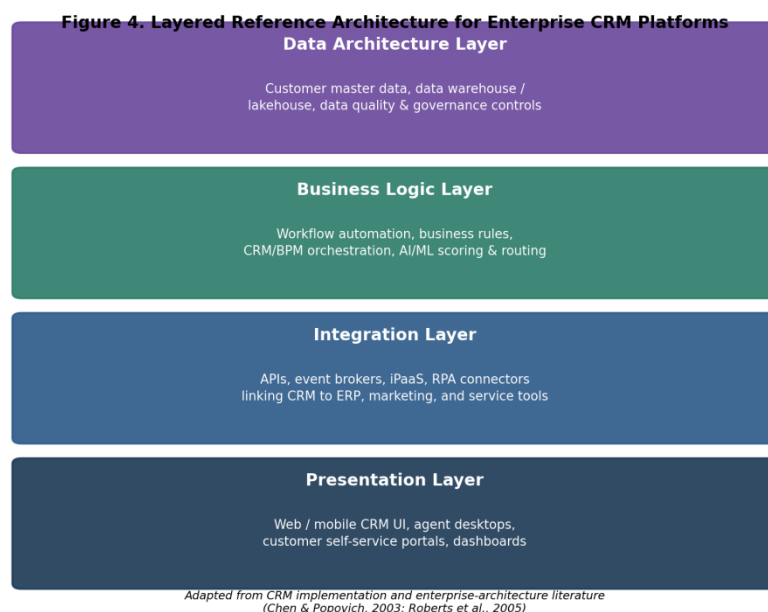


Figure 4. Layered reference architecture for enterprise CRM platforms, synthesized from CRM-ERP integration and enterprise-architecture literature.

The architecture illustrated in Figure 4 is CRM-vendor and deployment model (cloud, hybrid, or on-premise) agnostic and represents the concrete platform-layer view of the alignment model in the proposed architecture (Figure 2) to support the latter's execution in a real system.

4.4 A Taxonomy of CRM Critical Success Factors

The critical success factors included in the reviewed literature are categorized into the following four groups in

Figure 5: the three dimensions of the framework (i.e., people, process, technology), and the governance and adaptability factors that permeate all three dimensions. The taxonomy draws most directly from Abdul Hamid et al. (2022), who identified eight CSFs across the people, process, and technology categories in the SME context, and Jabado and Jallouli (2023), who found these three factor categories to be common in the broader CRM literature.

Figure 5. Taxonomy of CRM Critical Success Factors Synthesised from the Literature

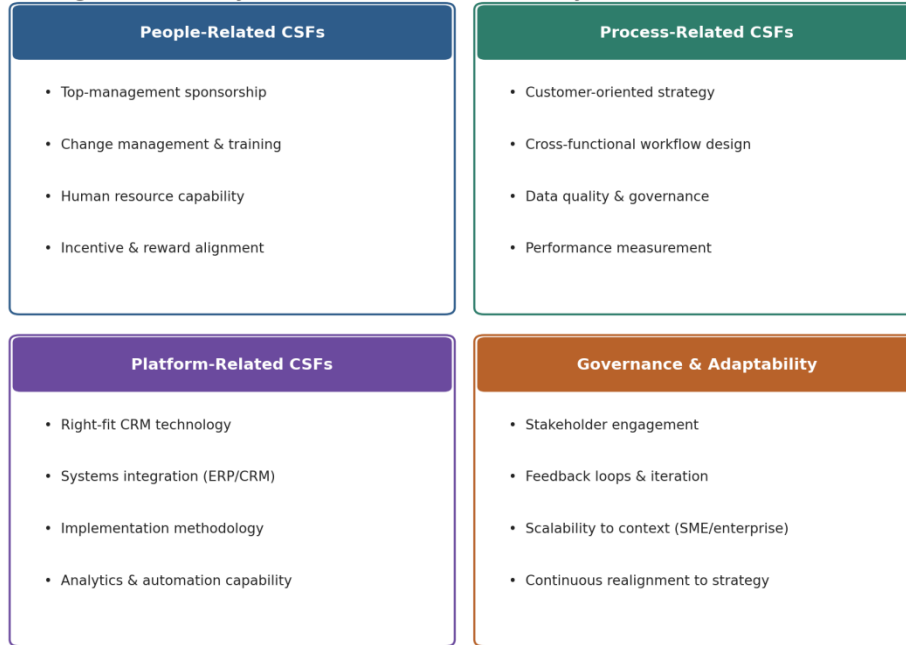


Figure 5. Taxonomy of CRM critical success factors synthesised from the literature, organized by framework dimension.

4.5 The Customer Experience Value Chain

Figure 6 depicts how the customer travels through a sequence of awareness, consideration, purchase, and post-purchase phases of a customer journey, supported by a set of CRM-enabled capabilities (lead scoring, omnichannel case management, and predictive churn

modeling). This aligns with the customer-experience node in the central framework of Figure 2, characterizing CRM platforms as providing personalized and responsive experiences that lead to customer loyalty and advocacy, as depicted in many studies of digital CRM (e.g. Jabbari & Lamari, 2024; Naim et al., 2024).

Figure 6. Customer Experience Value Chain Supported by an Aligned CRM Platform

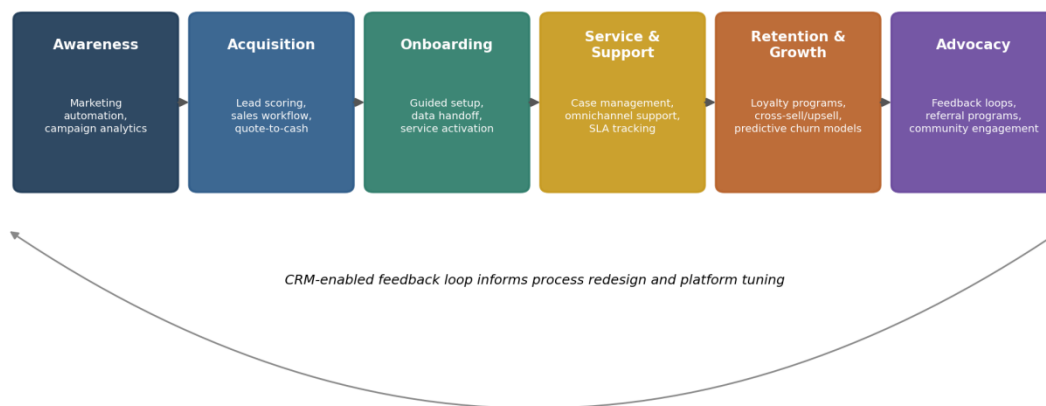


Figure 6. Customer experience value chain supported by an aligned CRM platform, with an embedded feedback loop informing process and platform refinement.

4.6 Comparative Analysis Against Prior CRM Models

Table 1 provides an overview of the streams of literature that support the different elements of the proposed framework. Table 3 provides a summary comparison of the framework with the three dominant CRM frameworks (Chen & Popovich, 2003; Payne & Frow, 2005; Roberts,

Liu, & Hazard, 2005) presented in Section 2. Since this paper does not conduct any new empirical investigations, comparisons between the frameworks are conducted along their conceptual domain, structural characteristics, presence or absence of constructs, staged-maturity hypothesis and value-chain mapping. Such a comparison does not provide any direct analyzes of either predictive power or statistical success. Such testing requires

empirical examinations going beyond the scope of this conceptual framework synthesis.

Table 1. Literature streams underlying each component of the proposed framework.

Literature Stream	Representative Sources	Primary Focus	Contribution to Proposed Framework
Foundational CRM conceptualization	Chen & Popovich (2003); Zablah et al. (2004); Payne & Frow (2005)	Defining CRM as people + process + technology; strategic process framework	Core three-dimensional structure; positioning of strategic alignment as connective mechanism
CRM process performance	Reinartz, Krafft, & Hoyer (2004); Verhoef (2003)	Empirical link between CRM process implementation and business/retention outcomes	Process dimension constructs; performance-linkage logic in Figure 2
Critical success factors	Roberts, Liu, & Hazard (2005); Abdul Hamid et al. (2022); Jabado & Jallouli (2023)	Cataloguing organizational, process, and technology success/risk factors, incl. SME context	CSF taxonomy (Figure 5); maturity-model staging logic (Figure 3)
Digital transformation & AI-CRM	Gil-Gomez et al. (2020); Chatterjee, Chaudhuri, & Vrontis (2022); Jabbari & Lamari (2024); Naim et al. (2024)	Effects of digitalization, AI, and personalization on customer experience and CRM outcomes	Platform dimension constructs; customer-experience value chain (Figure 6)
Enterprise architecture & integration	IBM (2025); applied CRM-ERP integration literature	Layered architecture and integration patterns for enterprise CRM/ERP ecosystems	Reference architecture (Figure 4)

Table 3. Structural comparison of the proposed framework against three influential prior CRM models.

Dimension Compared	Chen & Popovich (2003)	Payne & Frow (2005)	Roberts et al. (2005)	Proposed Framework (this paper)
Explicit People construct	Yes	Partial (via processes)	Yes	Yes
Explicit Process construct	Yes	Yes (5 processes)	Partial	Yes
Explicit Platform/architecture construct	Yes (general)	Partial	Yes (technology enabler)	Yes (layered architecture, Fig. 4)
Staged maturity perspective	No	No	Partial (staged case study)	Yes (5-stage model, Fig. 3)
Customer-experience value chain	No	Implicit	No	Yes (Fig. 6)
CSF taxonomy included	No	No	No	Yes (Fig. 5)
Primary intended use	Explanatory / diagnostic	Strategic planning	Explanatory (technology role)	Diagnostic + strategic planning

This suggests that the contribution of the framework is, itself, not in terms of the people, process, and platform elements (which are clear independently in other contributions) but in linking them together as one component of a diagnostic framework which incorporates staged maturity reasoning, an explicit reference architecture, and a customer-experience value chain. Other models may stress one or two of these structural elements, such as Payne and Frow's process view of

service value co-creation and Roberts, Liu and Hazard's technology as enabler view, but are not interdependent nor together presented as a join-up applied tool, as is the intention here.

5. Discussion

5.1 Theoretical Implications

The proposed model offers some contributions to CRM theory, for example, by describing calculated alignment

as a connecting element instead of focusing on its role as a prerequisite for success, as discussed in Section 2.5. Existing critical-success-factor studies show lists of influencing success factors without linking them with each other. Third, the maturity model in Figure 3 adds a developmental aspect to the basic CRM literature, which the research in question does not cover. As discussed in Section 2.5 earlier, the literature on CRMs usually describes their success cross-sectionally, rather than as a set of capabilities that grow over time. Third, as shown in Figures 2 and 4, the framework combines architectural and organizational reasoning, bringing together the enterprise-architecture and organizational-behavior literatures on CRMs.

5.2 Practical Implications

In practice, the framework should be read as diagnostic, and CRM readiness diagnostic questions for potential implementing organizations are listed in Table 2. This should help organizations to make sure they are aligned on the three dimensions of the current state before committing to platform choice and so avoid the failure pattern of choosing a technology before a readiness assessment as discussed in Abdul Hamid et al. (2022) and Section 2 above. Organizations with existing CRM systems can use the maturity model in Figure 3 below to determine which maturity stage they are at and which organizational or architectural weaknesses are preventing it from progressing to the next stage rather than just investing in additional features.

In summary, the CSF taxonomy in Figure 5 and the reference architecture in Figure 4 constitute a complementary pair of planning artifacts, with the taxonomy addressing organizational readiness (people and process) and the architecture addressing technical readiness (platform). In combination with the central framework in Figure 2, these also provide a means to avoid simultaneous planning of organizational and technical readiness as discussed by Chatterjee et al. (2022) when adopting AI-embedded CRM.

5.3 Boundary Conditions and Limitations

The framework has a number of limitations. First, because it is a theoretical literature review, it has not been statistically validated nor have the relative weights of people, process and platform or their causal priority been shown to be greater than or less than one another. Some of the studies reviewed place greater emphasis on organization culture and knowledge management than on technology, while others give more importance to technology as an enabling condition. This paper does not resolve that disagreement, but holds all three dimensions to be jointly necessary, in agreement with the enormous majority of researchers covered in Section 2.

Second, the maturity model in Figure 3 is only a heuristic and organizations may be at distinct stages, such as being more technologically mature but organizationally fragmented for a particular dimension of maturity simultaneously. The maturity model can therefore be used dimension by dimension, rather than as a single composite maturity score.

Third, the framework may be more or less applicable depending on the context of the organization. Much of the critical-success-factor literature synthesized here (e.g., Abdul Hamid et al. 2022) is in SME contexts while the architectural guidance synthesized in Figure 4 is more enterprise and large organization oriented. Practitioners in either scenario should weight the framework appropriately towards the relevant component rather than applying it uniformly across the components.

Fourth, in light of CRM technology's fast evolving nature, and particularly with regards to the possibility of being embedded with AI technologies (Chatterjee, Chaudhuri, & Vrontis, 2022), the platform context of the framework and the architecture of Figure 4 should be understood as a snapshot of the literature which can change regularly.

5.4 Agenda for Future Empirical Research

The proposed framework can be operationalized for empirical research. In survey-based studies, the diagnostic questions in Table 2 could be used as measurement items. Then, the relationship between the three alignment dimensions and CRM outcomes could be tested, such as customer retention, share-of-customer, or sales productivity, analogous to the process-performance approach by Reinartz, Krafft, and Hoyer (2004). Further case-study research could be carried out to determine whether the organizations' self-reported maturity level matches independently observable indicators of CRM success or benefits, providing additional validation of the model. Comparisons could also be direct between the SME and enterprise contexts, with a test of the boundary conditions as to whether the people, process and platform dimensions differ in importance as a function of organization size.

6. Conclusion

This paper has argued, on the basis of a synthesis of the CRM literature in foundational conceptual papers, critical-success-factor research, and emergent research on digital transformation and AI-embedded CRM, that platform capability by itself does not explain CRM effectiveness. Organizations that treat CRM as reflecting a technology procurement decision are systematically more likely to experience implementation failure or underwhelming business value than organizations that treat people, process, and platform as jointly necessary

and mutually reinforcing dimensions of a single calculated initiative.

The paper's main contribution is an integrative alignment framework for CRM developed by means of conceptual synthesis. More specifically, planned alignment is seen as the linking function between organizational capability, process design, and platform architecture on the one hand and customer experience and business value on the other. The alignment framework is instantiated by three related conceptual artifacts (i.e., a five-stage CRM alignment maturity model, a layered CRM reference architecture, and a taxonomy of CRM critical success factors) which are each mapped onto a respective cited strand of the reviewed literature. The framework is also set against three prominent precursory CRM models.

Contributions from the framework's applicability come from its being a diagnostic and planning tool, offering a single structure within which to locate organizational readiness assessment, process governance and technical architecture decisions rather than separate workstreams owned by different parts of the organization. Its limitations stem from the fact that it is a conceptual framework that requires formal quantitative validation of its constructs and staged reasoning. The proposed future research agenda (survey-based construct validation, and testing the maturity model via case studies and comparative research into SMEs and enterprises) offers a means to achieve that validation, and improve our evidence-based understanding of how organizations can align people, processes, and platforms in order to convert CRM investment into sustained business growth.

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