

MASTERS IN MANAGEMENT AND INDUSTRIAL STRATEGY

MASTER'S FINAL WORK DISSERTATION

**THE IMPACT OF AI-CRM ON THE SELLING PROCESS AND BUSINESS
RELATIONSHIP DEVELOPMENT**

Pedro Manuel Figueira de Matos Cardoso Alves, I59911

SUPERVISION:

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Glossary

AI – Artificial Intelligence

AI-CRM – Artificial Intelligence-Enhanced Customer Relationship Management

B2B – Business-to-Business

CRM – Customer Relationship Management

IT – Information Technology

ITM – IT Manager

LSE – Lead Solution Engineer

SC – Sales Consultant

SE – Sales Executive

SM – Sales Manager

Abstract

This study aims at exploring how Artificial Intelligence-Enhanced Customer Relationship Management (AI-CRM) tools impact sales processes and business relationship development in a business-to-business (B2B) context. While prior studies have highlighted the general benefits of adopting AI-CRM systems, there is still limited understanding on how this technology influences sales processes to achieve such advantages.

Therefore, this investigation is grounded on a case study supported by 11 semi-structured interviews. Research examines eight companies from various sectors that have either adopted or are willing to integrate AI-CRM systems, as well as developers and implementers of this technology, with the focus on how it can affect sales processes and, in turn, support relationship development.

Results show that companies are currently prioritizing long-term relationships while maintaining a transactional foundation. Customer loyalty has become an essential objective and to achieve it, trust, commitment, satisfaction, communication and conflict management must be nurtured. To facilitate long-term relationship development, companies adopted a customer-oriented and solution selling strategy, leading to a shift in the salesperson role and sales process structure. To support this change, Customer Relationship Management (CRM) systems were introduced. However, this technology rapidly evolved and has now integrated Artificial Intelligence (AI). The upgrade to AI-CRM systems further influenced sales processes by expanding traditional tools with predictive, generative and automated features, leading to improvements in efficiency, effectiveness, decision-making, collaboration and interaction. This impact empowered sales professionals to better foster loyalty drivers, strengthening relationship development with customers. Nonetheless, successful adoption requires companies to overcome human and technological challenges.

This study contributes to the growing body of literature on AI-CRM by offering a comprehensive perspective on how this technology impacts sales processes, further reinforcing a customer-oriented strategy, which results in a stronger establishment of successful business relationships in which loyalty prevails.

Key words: AI-CRM, Relationship Development, Sales Process, Customer Loyalty, B2B

Resumo

Este estudo visa explorar o impacto de ferramentas de Gestão de Relacionamentos com Clientes com recurso a Inteligência Artificial (IA-CRM) nos processos de vendas e no desenvolvimento de relacionamentos comerciais num contexto business-to-business (B2B). Embora estudos anteriores tenham destacado os benefícios gerais da adoção de sistemas de IA-CRM, ainda existe um conhecimento limitado da forma como esta tecnologia influencia os processos de vendas para alcançar tais vantagens.

Deste modo, esta investigação baseia-se num caso de estudo apoiado por 11 entrevistas semiestruturadas. A investigação examina oito empresas de vários setores que adotaram ou estão dispostas a integrar sistemas de IA-CRM, bem como desenvolvedores e implementadores desta tecnologia, centrando-se em como esta pode afetar processos de vendas e, consequentemente, apoiar o desenvolvimento de relações.

Os resultados mostram que as empresas, neste momento, priorizam relações de longo-prazo, mantendo uma base transacional. A fidelização de clientes tornou-se um objetivo essencial e, para a alcançar, é necessário cultivar confiança, empenho, satisfação, comunicação e gestão de conflitos. Para facilitar o desenvolvimento de relacionamentos de longo-prazo, as empresas adotaram uma estratégia orientada para o cliente, o que levou a uma alteração no papel do vendedor e na estrutura do processo de vendas. Para apoiar esta mudança, foram introduzidos sistemas de Gestão de Relacionamentos com Clientes (CRM). No entanto, esta tecnologia evoluiu rapidamente e passou a integrar Inteligência Artificial (IA). A atualização para sistemas de IA-CRM influenciou ainda mais os processos de vendas ao expandir as ferramentas tradicionais com funcionalidades preditivas, generativas e automatizadas, levando a melhorias de eficiência, eficácia, tomada de decisões, colaboração e interação. Este impacto permitiu aos vendedores desenvolver melhor os fatores de fidelização, reforçando o desenvolvimento de relações com os clientes. Contudo, uma implementação de sucesso requer que as empresas ultrapassem desafios humanos e tecnológicos.

Este estudo contribui para o crescente corpo de literatura sobre IA-CRM, oferecendo uma perspetiva compreensiva sobre o impacto desta tecnologia nos processos de venda, reforçando ainda mais a estratégia centrada no consumidor, o que resulta num estabelecimento mais forte de relações comerciais de sucesso onde vínculos prevalecem.

Palavras-Chave: IA-CRM, Desenvolvimento de Relações, Processo de vendas, Fidelização de Clientes, B2B

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Introduction

In today's rapidly evolving environment, changes in the business landscape, the rise of digital technologies, shifts in customer expectations, and higher levels of business collaboration have led companies to undergo major transformations in the way they relate to customers (Moncrief & Marshall, 2005; Anderson, 1996; Morgan & Hunt, 1994).

As a result, many organizations have moved away from a purely transactional approach, where interactions are often short-lived and price-focused, towards a more relational perspective, keen on building long-term relationships with customers (Pedron & Saccol, 2009), with the goal of achieving customer retention and loyalty (Dowling, 2002).

Seeking to maximize value across the commercial lifecycle through the adoption of a more relational belief (Payne & Frow, 2005; Reimann *et al.*, 2010), companies had to adjust sales, marketing, and post-sales roles (Viio & Gronroos, 2014). Consequently, new organizational approaches emerged as a way to highlight long-term, mutually beneficial relationships (Idzikowski *et al.*, 2019). Within the sales domain, multiple methods were introduced, with the customer-oriented and solution selling approach being one of them (Arli *et al.*, 2018).

The shift towards this concept involved transformations in people and processes (Rodriguez *et al.*, 2018). The salesperson, as the first point of contact with the customer, became responsible for developing the relational foundation (Anderson, 1996), by nurturing trust, satisfaction, commitment, communication, and problem handling (Ndubisi, 2007). To ensure the salesperson's new role was successfully realized, the stages of the sales process evolved (Moncrief & Marshall, 2005).

Consequently, to support the customer-oriented strategy, CRM systems were adopted. This technology is typically modular, and within each module, various types of data collection, analysis, and transfer functionalities are combined to support specific business areas, including sales, marketing, and customer service, improving efficiency and decision-making (Idzikowski *et al.*, 2019). For sales, the adoption of this system helped salespeople in the navigation and realization of the sales process, so that they could successfully establish and maintain a long-term relationship with the client (Nguyen *et al.*, 2020; Ledro *et al.*, 2022).

As with other technological tools, CRM systems are continuously being modified and upgraded. Recently, AI emerged and began to be used for a wide range of business purposes. Hence, to take advantage of this modern technology's expanding power, AI is being integrated into CRM, forming AI-CRM systems (Saura *et al.*, 2021). According to Gaczek *et al.* (2023), by adopting this system, companies can take advantage of a wide range of capabilities beyond previous CRM applications.

Similar to earlier CRM systems, AI-CRM has multiple modules with specific functionalities for sales, marketing, and customer service. However, while existing studies like those by Chatterjee

et al. (2021), Rahman *et al.* (2023), and Saura *et al.* (2021) have significantly contributed to the AI-CRM literature, providing some insights on the general benefits of using the system, there is still a lack of understanding on how it impacts sales processes to achieve such advantages and, subsequently, how it can strengthen business relationship development with B2B customers.

This study aims to explore this gap by focusing on the following research questions: (1) How is AI-CRM propelling changes to the sales process? (2) How is AI-CRM affecting business relationship development?

By exploring such questions through the development of a case study, this research contributes to the existing literature on the topic, offering a detailed understanding of the influence of AI-CRM on sales processes and relationship development. The findings are particularly relevant for firms intending to leverage AI-CRM technologies, especially the sales module, to enhance sales processes and to build deeper customer connections.

This dissertation is organized as follows. First, chapter 2 presents a review of the relevant literature. This section explores previous research on relationship approaches, sales methods and processes, CRM, and AI-CRM systems. Following this, chapter 3 showcases the methodology of the paper, demonstrating the research strategy, data collection, and analysis. Furthermore, chapter 4 introduces and describes the case study while chapter 5 interprets the results obtained. Finally, chapter 6 presents the conclusion.

Literature Review

Relationship approaches

A relationship can be defined as a process in which at least two actors interact and make exchanges (Holmlund & Tornroos, 1997). Whipple *et al.* (2010) and Morgan & Hunt (1994) consider two distinct perspectives within B2B systems: transactional relationships and collaborative relationships.

On the one hand, transactional relationships are usually identified as “a buying–selling agreement where participants conduct business for a specific time period according to terms generally outlined in a standard contract” (Whipple *et al.*, 2010). This approach positions the seller as the active participant in the transaction, while the buyer remains relatively passive, making a purchase decision solely based on the proposed transactional value (Fruchter & Sigué, 2005; Gronroos, 1994). The duration of the interaction is often brief, centering on immediate gains over long-term commitment, which makes it adequate for high-volume and low-involvement markets (Coviello & Brodie, 2001).

On the other hand, collaborative relationships move away from simple transactions to long-lasting partnerships, prioritizing cooperation, commitment, trust, and mutual value creation

(Coviello & Brodie, 2001; Morgan & Hunt, 1994; Anderson & Narus, 1990). Whipple *et al.* (2010) describe this form of connection as “a long-term relationship where participants generally cooperate, share information, and work together to plan and even modify their business practices to improve joint performance.” This type of relationship involves long sales cycles, multiple decision-makers, and a focus on joint problem solving and innovation (Coviello *et al.*, 2002; Lilien, 1987).

Both perspectives represent the two ends of a spectrum. Within this continuum, companies establish their relationship portfolios, determining for each client which position best suits them (Whipple *et al.*, 2010). In many industries, as customer loyalty and co-creation of value are becoming key success factors offering the potential for competitive advantage, that position is moving closer towards the collaborative perspective, especially with customers that exhibit high value (Peppers & Rogers, 2000; Morgan & Hunt, 1994). Despite the shift towards a more relational approach, economic transactions remain embedded (Fruchter & Sigué, 2005). By doing so, companies are prioritizing the development of long-term connections, focusing on retaining profitable customers and achieving loyalty while also improving their economic performance (Whipple *et al.*, 2010). Thus, as showcased by Moncrief & Marshall (2005) and King *et al.* (2016), rather than making brief interactions and continuously searching for new clients, firms are now finding a sustained trade-off between retention and acquisition, reducing costs.

While the dual view of transactional versus collaborative relationships provides a broad perspective, these approaches are not mutually exclusive, being interconnected most of the time. Walter *et al.* (2001) introduce a complementary framework, categorizing relationships based on direct and indirect functions. This framework considers selling relationships to be closer to transactional ones, where companies value mainly direct functions such as volume and profit. Direct functions are those that directly affect the firm’s performance, such as profit generation and volume purchases (Purchase *et al.*, 2009), while indirect functions focus on long-term strategic value, such as market access and innovation (Walter *et al.*, 2001; Purchase *et al.*, 2009). Beyond purely selling relationships that only involve direct functions, networking partnerships focus mainly on indirect functions. Additionally, Walter *et al.* (2001) identify two more perspectives: low-performing relationships, which consist of connections between companies that serve neither direct nor indirect functions, often due to being new, near dissolution or simply unproductive and high-performing relationships that fulfill both direct and indirect functions, attaching a very high strategic value.

This relational shift is mostly centered on achieving customer loyalty. Oliver (1999) considers it a determinant factor for business success and defines it as “a deeply held commitment to rebuy or patronize a preferred product/service consistently in the future, thereby causing repetitive same-

brand or same brand-set purchasing, *despite* situational influences and marketing efforts having the potential to cause switching behavior.”

Companies that understand the way customers behave and that focus on relationship building rather than on short-term sales are more likely to achieve higher customer satisfaction and in turn, more repeat purchases (Ryding, 2010; Ranchhod & Gurau 2004; Khan *et al.*, 2020). As Ryding (2010) mentions, if the overall customer satisfaction of a company is high then the firm must have been successful in delighting its customers to some extent making them more likely to be loyal to the organization, hence resulting in more repeat purchases and resistance to switching to competitors.

However, Oliver (1999) argues that although satisfaction correlates with loyalty, there are other factors required for loyalty to happen. Additional drivers may include trust, communication, commitment, and conflict handling (Zegullaj *et al.*, 2023; Hakim & Hakim, 2017; Ogbeide & Ikande, 2021; Ndubisi, 2007).

Trust plays a big role in establishing long-term relationships and customer retention. It is fostered by keeping promises, guaranteeing security in every transaction, providing quality services, and showing concern for the client (Hakim & Hakim, 2017; Morgan & Hunt, 1994; Oliver, 1999). Another important dimension in ensuring strong business-customer relationships is effective communication. Providing clear, prompt, and reliable information can make or break a company (Ogbeide & Ikande, 2021; Ndubisi, 2007; Khan *et al.*, 2020). Besides communication, organizations that put customers first by prioritizing their needs and committing time and resources to a relationship are more likely to secure customers for a longer period (Hakim & Hakim, 2017; Ndubisi, 2007; Morgan & Hunt, 1994). Moreover, proactively addressing customer concerns and solving problems before they escalate into major issues can help mitigate disputes and ensure a positive customer experience (Ndubisi, 2007; Ogbeide & Ikande, 2021; Dwyer *et al.*, 1987).

Therefore, companies aiming to nurture loyal customers should take into consideration aspects of trust, commitment, communication, and conflict handling (Ndubisi, 2007).

Evolving sales process

Sales play an important role in developing and maintaining business relationships (Viio & Gronroos, 2014). Over time, many selling approaches have emerged, “including individual selling, buying center, adaptive selling, and customer orientation and solution selling” (Arli *et al.*, 2018). Centered on a transactional nature, early sales methodologies, such as individual selling, focused salespeople’s efforts on prospecting and closing deals, paying little consideration to buyers' needs (Borg & Young, 2014; Evans, 1963). Regarding the transactional view of selling, Dubinsky (1981) developed and presented the traditional sales process.

A process can be defined as a developmental sequence of activities carried out by an organization over time (Pettigrew, 1997; Van de Ven, 1992). Thus, “Dubinsky (1981) discussed the sales process as a sequential seven-step process, starting with prospecting and concluding with the follow-up” (Rutherford & Matthews, 2024).

However, as businesses are willing to engage with the involved party in more than just mere transactions or exchanges, increasingly prioritizing the establishment of long-term relationships with profitable customers, the focus of the selling process has shifted from transactional to relational (Corsaro & Maggioni, 2021).

As a consequence, selling expanded to include both seller and buyer perspectives (Borg & Young, 2014). During the 1980s, Plank & Dempsey (1980) introduced a new concept of sales with the buying center approach. This method recognized that selling included establishing interpersonal relationships with multiple buying members within an organization (Hutt *et al.*, 1985; Dwyer *et al.*, 1987). Towards the end of the 20th century, an adaptive selling approach was instituted (Arli *et al.*, 2018) and salespeople started adapting their behavior to fit each customer’s needs (Viio & Gronroos, 2014).

More recently, as organizations centered their view and efforts on the customer, the adoption of the customer-oriented and solution selling method in sales practice increased (Arli *et al.*, 2018), changing the way salespeople operate and the structure of sales processes (Moncrief & Marshall, 2005; Anderson, 1996). This model sees sales as a relationship nurturing process rather than simple transactions, integrating technological tools and combining sales forces with customer service and marketing teams, and focuses on creating and delivering value and solving conflicts for dynamic solutions (Moncrief & Marshall, 2005; Arli *et al.*, 2018).

Moncrief & Marshall (2005) restructured Dubinsky (1981) traditional sales process, enhancing the previous seven-step model, so that it focused on building and maintaining profitable customer relationships. According to Borg & Young (2014), the evolved sales process prioritizes customer retention, relationship maintenance, problem solving, and value creation, all aiming at fostering customer satisfaction and long-term engagement.

Figure 1, present in Appendix A, illustrates, in a more detailed manner, the transition from the traditional seven steps of selling, according to Moncrief & Marshall’s research (2004), highlighting the transformative factors that have reshaped sales practices towards a more relationship-focused approach.

First stages of CRM

Moncrief & Marshall (2005) recognize the contribution and utility of CRM tools for businesses. Initially, CRM was considered an Information Technology (IT) solution to collect and centralize

details on buyer–seller conversations to better organize customer information (Rodriguez & Peterson, 2024).

CRM tools have considerably evolved over recent years (Saura et al., 2021). According to Xu et al. (2002), two main trends influenced the CRM system's creation: the birth of Industry 3.0, where IT and automation mechanisms gained traction (Mithas et al., 2021), and the shift from short-term, transaction-centered relationships to customer-based relationships.

Over time, with the rise of new electronic channels, such as the World Wide Web, and a major growth in customer data, new CRM systems, including Siebel and SAP CRM, were developed, expanding operational functions (Chen & Popovich, 2003).

Nonetheless, CRM technology was implemented as on-the-premise software, requiring significant investments in infrastructure, which limited its accessibility to certain companies and countries (Purnama & Susilowati, 2024). Thus, when cloud-based CRM, such as Salesforce, emerged, many companies, from small firms towards large multinationals, opted for it, taking advantage of cost savings in machinery, equipment and infrastructure, ease of maintenance, and improved accessibility (Chen et al., 2017).

With the rise of industry 4.0, technologies such as Big Data Analytics and Internet of Things were introduced (Rehman et al., 2025). CRM systems transformed into a more complex and sophisticated system going beyond operational functions to incorporate analytical features (Dubey et al., 2020; Perez-Vega et al., 2022).

The surge of mobile technology and social media further enhanced CRM systems, facilitating access to information and improving collaboration within and between departments (Rodriguez & Boyer, 2020; Perez-Vega et al., 2022). These technologies laid the foundation for the rise of the omni-channel strategy, characterized by “the integration and coordination of detached channels to meet consumers' needs for seamless channel transitions” (Shen et al., 2018) which played a crucial role in shaping CRM as an interactive system, facilitating a real-time, two-way engagement between business and customers (Agnihotri et al., 2017; Rodriguez & Boyer, 2020).

Therefore, CRM is currently viewed as a holistic system that includes databases, data mining features, automation tools, call center technologies, and web systems (Pedron & Saccol, 2009; Peppers & Rogers, 1997). For many companies, this system is integrated to support the customer-centric strategy across the whole commercial lifecycle, providing a different module for each field of marketing, sales, and customer service (Idzikowski et al., 2019). Within each module, operational, analytical, and collaborative functionalities are present (Idzikowski et al., 2019; Goodhue et al., 2002; Buttle & Iriana, 2006; Geib et al., 2006).

Operational functionalities gather, centralize, and manage customer data from multiple touch points, ranging from social media, the web, call centers, and stores, so that later this data can be used in analytical features (Goodhue et al., 2002). Basically, operational features are used to

automate and enhance the efficiency of daily marketing, sales, and customer service activities (Buttle & Iriana, 2006; Geib et al., 2006).

The analytical segment uses data warehousing and data mining technologies to turn data about customers into valuable insights (Goodhue et al., 2002). Analytical features analyze customer data to find patterns and make predictions, supporting teams in taking the correct business decisions (Idzikowski et al., 2019; Buttle & Iriana, 2006; Geib et al., 2006).

The collaborative component uses technologies, like social media platforms and communication tools, to facilitate interactions with customers and improve coordination and information sharing between departments (Idzikowski et al., 2019). By making use of the three previously mentioned modules, CRM modules can be used by companies to improve customer relationships and commercial results (Guerola-Navarro et al., 2021).

Traditional CRM capacities

Every year, to improve the execution of the sales process, as a way to strengthen customer relationships, companies spend millions of dollars on CRM sales modules (Jelinek *et al.*, 2006). A complete module provides sales professionals with tools to collect, analyze, and share customer data, strongly benefiting sales processes (Tanner Jr. *et al.*, 2005; Rodriguez *et al.*, 2018).

The first major contribution of CRM in sales is its ability to establish efficient processes by automating simple repetitive tasks (Guerola-Navarro *et al.*, 2021; Rodriguez & Honeycutt Jr., 2011; Rodriguez *et al.*, 2018). Through taking care of duties such as data entry and appointment scheduling and facilitating access to reports, contacts, and customer requests, this system reduces administrative work and enhances revenue generating time (Rodriguez & Boyer, 2020; Bojuena *et al.*, 2009).

Additionally, by combining and analyzing customer data, CRM provides sales teams with certain market and customer insights, supporting data-driven decision making (Rodriguez *et al.*, 2018). Such provisions help personalize solutions that fulfill individual customer needs and identify customers with higher probability of churning (Amoako *et al.*, 2012; Rodriguez & Boyer, 2020; Rodriguez & Trainor, 2016). Consequently, firms perform more successful and effective selling practices (Hunter & Perreault, 2006).

Furthermore, CRM software centralizes all customer data helping sales teams exchange information and cooperate with other departments in a better way, in order to deliver a seamless experience to customers, which is critical to sales' success (Rodriguez *et al.*, 2018). By helping salespeople coordinate with peers, CRM builds the foundation for internal collaboration and cooperative knowledge creation, improving the customer experience (Tanner Jr. *et al.*, 2005; Rodriguez & Honeycutt Jr., 2011).

By integrating multiple communication channels, CRM systems facilitate data collection and interactions between the seller and the buyer, allowing for a better dialogue with potential and current customers boosting sales outcomes (Rodriguez & Boyer, 2020). This system also supports sales follow ups and customer support by letting sales professionals stay in touch with customers beyond the initial purchase, addressing any customer requests and handling problems that might surge (Agnihotri *et al.*, 2017).

Therefore, CRM positively influences the sales process. This improvement helps sales professionals further nurture long-term relationships, enhancing customer loyalty driving factors (Jani & Han, 2014; Rodriguez *et al.*, 2018). The centralization of customer data and delivery of customer insights allows salespeople to know more about the customer's needs and preferences, reinforcing trust and displaying commitment (Nguyen *et al.*, 2020). Moreover, CRM facilitates the personalization of offerings, providing more value and enhancing customer satisfaction (Rodriguez & Boyer, 2020). Additionally, by supporting sales follow-ups, CRM further reinforces communication and problem handling (Agnihotri *et al.*, 2017). By nurturing these aspects, a solid foundation for higher levels of loyalty is established, automatically resulting in a greater sales turnover and leading to a sustainable competitive advantage (Jani & Han, 2014; Nguyen *et al.*, 2020).

AI-CRM capacities

Lately, the business world tends towards implementing techniques and software that leverage AI to better optimize business processes (Saura *et al.*, 2021). AI can be defined as the design, implementation, and use of programs, machines, and systems that show intelligence comparable to that of humans. Such human-like intelligence includes activities like knowledge representation, reasoning, and learning (Whitson, 2024). The integration of AI systems in businesses has already revolutionized various sectors, essentially by increasing efficiency, improving decision-making, and enhancing customer experiences (Gurjar *et al.*, 2024).

The widespread adoption of AI technologies in the business domain coupled with the abundance of customer data in the buyer-supplier relationship management space, has driven firms to invest and show considerable interest in applying AI-CRM tools (Chatterjee *et al.*, 2021). These systems combine AI elements with traditional CRM technologies, expanding previous operational, analytical, and collaborative features, with the goal of influencing commercial processes and enhancing customer engagement (Ledro *et al.*, 2022).

Within these AI elements, three core capacities stand out. The first one is the predictive ability of AI, allowing it to interpret large quantities of customer data and provide crucial insights in a more accurate and personalized way (Hermann & Puntoni, 2024; Ledro *et al.*, 2022). Secondly, the capability of AI to generate new information, be that in the form of text, image, or video

(Hermann & Puntoni, 2024). Finally, the capacity of AI to automate specific manual tasks, serving as a human assistant (Hou *et al.*, 2024).

These capacities make AI-CRM unique, allowing it to go beyond traditional CRM systems and bring a wide range of benefits that influence commercial processes even more (Saura *et al.*, 2021; Chatterjee *et al.*, 2021; Mcclure *et al.*, 2024). First, by collecting massive amounts of data from multiple sources and performing multiple manual tasks, AI-CRM makes processes more efficient (Yoo *et al.*, 2024; Chen & Zhou, 2022). Another differentiating advantage of these systems is their capacity to provide crucial recommendations (Rahman *et al.*, 2023; Zhang *et al.*, 2020). By analyzing large datasets, AI-CRM can detect patterns in data, allowing it to generate valuable predictions regarding possible opportunities and customer needs that help companies make decisions (Chatterjee *et al.*, 2021; Yoo *et al.*, 2024; Saura *et al.*, 2021; Chen & Zhou, 2022). Such previsions help companies deliver more personalized experiences which enhance both customer satisfaction and organization performance (Chen & Zhou, 2022; Rahman *et al.*, 2023).

Additionally, AI-CRM systems can automatically collect and centralize customer information in storage systems, which provides smooth departmental collaboration and facilitates information sharing (Chatterjee *et al.*, 2021). Furthermore, by integrating non-human communication tools, such as chatbots, AI-CRM provides customers with an additional contact method. This interface plays an important role throughout the customer lifecycle, interacting with clients, by processing questions and responding with instant answers, and providing constant support (Chen & Zhou, 2022; Pallathadka *et al.*, 2023; Mcclure *et al.*, 2024).

By automating routine tasks, fostering data-driven decision making, and enhancing collaboration and communication, AI CRM can help optimize sales, marketing, and customer service. However, as seen before, this system is organized in specific modules for each of the aforementioned areas, and, in each of them, these benefits are achieved in a different way. In the field of sales, Mcclure *et al.* (2024) notes that the adoption of AI integrated systems brought a significant impact on both the sales process and sales team performances.

AI-CRM limitations

According to Yoo *et al.* (2024), AI adoption in business has increased by 270% from 2015 to 2019. However, 70% of these companies reported minimal or no positive effect on their performance, meaning that many fail to effectively integrate and utilize AI-powered systems, as most are just introducing this technology without a clear strategy.

Thus, despite the many benefits AI-CRM brings to organizations, there are several barriers to actually achieving success. Chen & Zhou (2022) showcase that, in the context of AI-CRM, adoption does not always lead to better company performance as companies often face many obstacles when attempting to integrate AI into their operations.

Kale (2004) identifies seven deadly sins for unsatisfactory CRM outcomes, which can also be translated into AI-CRM: (1) treating CRM purely as a technology initiative; (2) no customer-centric vision; (3) insufficient prioritization of customer lifetime value; (4) inadequate executive support; (5) underestimating the importance of change management; (6) failing to re-engineer business processes, and (7) difficulties in data mining and data integration.

With the rise of AI technology, employees are increasingly expected to handle new workplace tasks (Chen & Zhou, 2022). Without proper training and investments, employees may struggle to adopt the new system effectively, leading to suboptimal adoption (Chatterjee *et al.*, 2021).

Many companies also face technological challenges, especially regarding correct infrastructure implementation as AI-tools require high-quality systems for optimal integration (Rahman *et al.*, 2023; Chen & Zhou, 2022). Additionally, poor data management and failure to adopt the correct security measures for data protection can lead to loss of customer trust (Chen & Zhou, 2022; Kim, 2010).

By understanding the risks associated with the adoption of these systems, managers are able to mitigate them and prevent regretful situations (Chatterjee *et al.*, 2021). Firms must invest in advanced IT training and technological infrastructure, so that they are able to successfully adopt AI-CRM and maximize their ability to take advantage of AI-CRM benefits (Rahman *et al.*, 2023).

Methodology

Research Strategy

The objective of this study is to understand how AI-CRM affects both the sales process and business relationship development with B2B customers. With an exploratory purpose, where research questions have a “How” nature, the investigation aims to study a topic that is currently not well understood (Yin, 2018). To gather deep insights on the topic, the study was supported by a qualitative method where data regarding the experiences and perceptions of people is collected and analyzed (Flick 2014; Saunders *et al.*, 2023). To understand the dynamics and complexity of the research questions elaborated throughout the investigation, a case study design was adopted (Yin, 2018; Creswell, 2014).

Due to time constraints, this research follows a cross-sectional horizon, meaning that it only captures data once, at a single point in time, providing a snapshot of the phenomenon as it exists in the moment of the investigation (Bryman, 2012; Saunders *et al.*, 2023).

This study includes mainly companies that have adopted or are willing to adopt AI-CRM systems, especially the sales module, in the short to medium term. Further, the investigation only contemplates companies with B2B sales operations in Portugal. Thus, to correctly align with the

research questions of the study, non-probability sampling and purposive sampling techniques are used, which means cases are selected based on previously mentioned characteristics, ensuring relevance and depth (Teddlie & Yu, 2007). Therefore, eight companies, within three categories, were selected:

- Firstly, two of them are responsible for developing CRM solutions and were some of the first companies to integrate AI into CRM systems. In addition, these companies fully leverage the functionalities of their own AI-CRM solutions and, due to direct experience with this technology, have crucial insights to offer on the matter.
- Secondly, a consulting firm with experience in technology implementation was selected. This firm has partnerships with the previous companies and supports the integration of AI-CRM systems into client organizations.
- Finally, it was important to understand how clients of the first two companies are using or willing to use these systems to boost their sales processes and improve relationship development with their own clients. Hence, one American company and four Portuguese firms, with B2B Sales operations in Portugal, were selected. From this lot, two companies have already adopted AI-CRM systems while the other two are currently under the process of shifting to this technology. The last company was mostly contacted to further explore the challenges of this adoption, since this firm is not yet willing to make the transaction to AI-CRM systems.

Table I, presented in Appendix B, highlights some more information regarding the companies selected for this research.

Data Collection and Analysis

The primary data was collected through 11 interviews with 11 participants. The semi-structured interview format was followed, combining a balance of structure and adaptability, allowing the interviewer to delve deeper into certain topics to gather more detailed and nuanced knowledge (Yin, 2018; Saunders *et al.*, 2023). Aligned with the research questions, several themes were included in the interview guide, and for each theme a set of questions was established. Additionally, to gain a deeper understanding of related topics several questions emerged during the course of the interaction. By combining pre-prepared questions with others that arose during the conversation, this approach enabled adaptation for each participant, while maintaining a consistent structure within interviews. **The interview guide, found in Appendix C,** was adapted according to the interviewee's expertise and the interaction that took place.

Of the people interviewed, eight were sales professionals and three were IT managers (ITM). For companies that have not yet adopted AI-CRM systems, a conversation with an ITM was crucial

to better grasp what the current company CRM systems are lacking and how introducing AI would add value to the sales process already in place. All the interviews were conducted one-on-one and lasted, on average, 45 minutes. Every meeting was recorded whether the conversation was online or in person. The interviews focused on the way each company develops relationships with their consumers, how their sales processes serve as a foundation for that development, and how AI-CRM systems are a positive influence for both sales processes and subsequent relationship development. Data collection continued almost until saturation was achieved. Despite Guest *et al.* (2006) showing that saturation occurs only after 12 interviews are made, the sample size of 11 interviews was considered sufficient to capture all the constructs crucial for the topic of investigation.

The use of secondary data from organizational sources, including reports from the selected companies and the utilization of an AI-CRM system from a competitor of the two developing companies of CRM solutions chosen for this study, was central to enhance the primary data collected. This technique is compatible with case studies, as it provides additional secondary data about the approached concepts, providing adequate support to the primary data collection method (Miles & Huberman, 1984). This approach also ensures validity and depth and aligns well with a qualitative research method (Yin, 2018).

Data was then analyzed using a thematic approach. With this method, it was possible to identify and analyze patterns in the data collected (Braun & Clarke, 2006; Saunders *et al.*, 2023). By following this technique, the interview recordings started being compiled and sorted. Afterwards, data was coded and analyzed, based on the conceptual framework. Considering Miles & Huberman's iterative approach (1984), the codes were then subsequently classified into more general categories aligned with the research questions.

Case Study

As previously mentioned, to understand the impact of AI-CRM on sales processes and subsequently on relationship development, eight companies were interviewed. The in-depth exploration of each company relationship development approach, sales process, and adoption of AI-CRM systems makes up the case study. This section dives into the functionalities and implications of AI-CRM across multiple organizational contexts. As referred, the case study mainly incorporates three types of companies: (1) companies that develop and use their own AI-CRM systems, (2) firms that are clients of the previous and have adopted AI-CRM systems, and (3) firms that are willing to adopt AI-CRM systems in a short-to-medium time frame.

Relationship Development

In the modern organizational context, it is very common for companies to establish large and heterogeneous client portfolios, including a wide range of companies, from small and medium enterprises to large multinationals. The Sales Manager (SM) from the company Hotel mentioned, “(...) we have a range of clients from small business, or an individual entrepreneur, to large enterprises. (...) Therefore, all of this makes up our client portfolio.”

There are several ways companies can develop relationships within their customer portfolios in a B2B context, through a range that flows from purely transactional to purely relational approaches. For the companies interviewed, all respondents have perceived that, within their industries, a fully transactional vision, focused on selling without truly considering the client's needs, no matter their segment, is no longer useful. Interviewees mentioned that a shift in their vision and philosophy towards a more relational customer-centric approach, expressing a desire to focus on developing long-term partnerships with customers, aiming to continuously satisfy their needs with the goal of achieving loyalty and retention, has been developed. The SM from company Hotel commented that the company always tries to focus on establishing and developing long-term relationships with their customers, no matter their size, whereas the Sales Executive (SE) from company Sierra showcased the importance of partnerships with clients for the success of the company.

While some companies follow the same approach with every customer, others adopt different approaches for distinct segments of customers. Within the companies interviewed, most mentioned a difficulty in establishing profound relational partnerships with smaller customers, as they make up a large share of the business and it is difficult to deeply focus on each one. Despite this, companies argue that there is still a certain relational perspective. For example, company November, adopts a mass approach for smaller clients, where one person is responsible for multiple customers and the relationship development process is usually simpler, while company Mike uses partners to sell and implement their offerings. Nevertheless, both companies continuously communicate with their customers and try to handle their problems. For large corporate clients, firms interviewed described following a more direct approach where a complex relationship development process takes place with the intention of building loyalty and optimizing retention levels.

Still, it is important to notice that despite this relational view, most companies argue that they do still operate with a transactional foundation. When asked about the metrics and indicators used to measure the success of a customer relationship, companies pointed out metrics of satisfaction and retention but also mentioned revenue, average order value, and other indicators used for evaluating performance. The SE from company Tango pointed out that “satisfying a customer and achieving loyalty is important, but without economic return the company isn’t satisfied, and

there needs to be satisfaction on both sides.” However, companies noted that they no longer see transactions as an endpoint to a small-term relationship, rather as just a moment in the long partnership they establish with customers. As the SM from company Golf explained:

“The question is how do you get to the transaction, right? Is it through a vision, a team, a strategy, and a value proposition focused on the transaction or is it through a commercial approach centered on the relationship that culminates with a transaction. In other words, we have managed to minimize the focus on day-to-day negotiations by compensating with a relational component of trust, proximity, and knowledge, which is highly valued by clients.”

For respondents, competition is growing fiercer, which makes it harder to attract and retain customers. As showcased by the company Hotel SM “At the moment, retention is the biggest challenge all companies have (...) because more and more, there is a wider spectrum of services and companies that provide the same service as us, which makes it very hard to stand out.”

According to the interviewees, it is crucial to successfully establish long-term relationships as it results in customer loyalty. As indicated by Sierra Lead Solution Engineer (LSE), loyalty has become essential for companies since loyal customers are more willing to continuously purchase from the same company and serve as promotional partners, creating new sales opportunities, through word-of-mouth, that companies can leverage on. Tango SE added that, by retaining customers, both companies and customers reduce costs. Nonetheless, companies expressed that this does not mean they completely stop trying to attract new customers, but instead of making several investments in prospecting, they rather prefer to fine-tune their commercial operations in order to meet their needs for growth. As said by Tango SE “a company that wants to grow at a certain rhythm, if it has a good retention rate, can just fine-tune the commercial effort, having only a commercial team that is enough to replace any customer turnover it has.” The Golf SM added on this aspect claiming that, “Retaining customers does not imply that there is a permanent effort and that every day we create new contracts. The objective of growth is always present.”

Based on the interviews, companies reported that to implement a successful partnership that results in genuine customer loyalty, multiple factors need to be nurtured throughout the whole process of relationship development. First of all, satisfying customer needs, especially in terms of reliability and product/service quality, was considered essential.

For both the SM and the ITM of company Hotel, that means:

“Having the ability of being able to respond and the capacity of providing a service whenever the client wants it and in the place they pretend, and that need is specific to that moment and to what the company is developing.”; “Each client is our number one, which

means, trying to provide the best possible service to the client, ensuring that in the future we have new business opportunities with the same client.”

Additionally, the SE from company Tango commented on the importance of aligning the offer to the client’s DNA through unique customizations since one company’s necessities are not exactly equal to other companies’ needs. Customers value when the seller adapts its offerings to address their unique needs. As mentioned by company Hotel ITM, adapting means “individualizing each client by aligning an offer according to their specific needs, considering the aspect of the traditional standard service.”

While some companies may adopt hard customization techniques, the ones interviewed explained that they essentially focus on soft customization methods by selecting existing solutions according to the customer’s requirements. Both the companies Sierra and Mike explained that completely personalizing their offerings to meet the customer needs would not be beneficial, as they are continuously adding new functionalities to the solutions offered. A more standardized set of solutions is needed in which, during the implementation phase, customers can apply their own add-ons. Companies referred that this is the ideal trade-off between cost efficiency and customization to the client’s specific needs.

Nevertheless, as shown by Tango SE, companies cannot leave customer loyalty solely to their perception of satisfaction as it will not be enough to achieve a successful relationship. Therefore, interviewees also identified trust and commitment as factors that make up the foundation of each company to achieve prosperous relationships with customers. Trust was always seen, by the interviewees, as the ability to deliver on promises and act honestly and ethically. As stated by both Sierra SE and LSE, respectively: “(...), the principal theme we want to have with the customer, is a relationship of trust, knowing that the data is safe and that we won’t use customer information for our benefit.”; “Thus, gaining that trust and also ensuring that the customer is safe with the steps they are taking with us.”

Commitment was described as the willingness to invest time, effort, and resources into the relationship. As Tango’s ITM explained, “It is important to get to know the space, get to know the people that work there, that go there, and get to know their habits and their culture.” The SE from company Tango commented that without having this willingness, it is not possible to build a relationship of proximity.

Effective communication and the ability to solve problems were also mentioned by multiple interviewees. As noted in the interview with company November, through honest and effective communication, companies can get closer to their customers, creating a relationship of proximity. As explained by Hotel SM:

“(...) it is important to create an aspect of effective communication with the customer. Because there are lots of clients who like direct contact, being sure that they can receive a direct response. It is even more important for companies to ensure the customer that if they have a problem, they won’t have to wait long for it to be resolved.”

Finally, companies such as Sierra and November also identified innovation and alignment with the customer values and beliefs, through inclusion and sustainable actions, as emergent elements to achieve loyalty.

Sales Process linkage to relationship development

As explained by multiple companies, the whole process of relationship development starts with sales. Interviewees described how a shift towards a more relational belief has led to changes within the sales role to ensure a better alignment with this view. Sales were said to have moved away from a short-term transactional role, focused only on closing deals, towards a customer-oriented approach, centered on developing long-term business relationships. Respondents expressed that this perspective provides a holistic view of the customer and its necessities allowing the salesperson to build value over time and provide a better offer, more aligned with the client’s needs. As mentioned by company Tango SE, “It allows me to understand what needs the customer has, so that I can bring them home, study the best solution, make a price, estimate, propose an offering and then see if I can win that proposal or not.”

According to the companies interviewed, salespeople have become responsible for developing all of the aspects needed to build the foundation for a successful, long-term partnership. As November SM indicated, the salesperson is the first one that can identify initial customer problems and doubts and is the one that can effectively communicate the company’s offer and satisfy all customer needs.

Additionally, as both Tango ITM and SE specified, respectively, “Commercials have a fundamental paper in starting to create that relationship of trust with potential clients so that they establish the contract.” “The commercial team was told to visit their clients within a year because one day they would be called to compete again, for a new contract. A person that visits will establish a relationship that can be useful when problems occur.”

Furthermore, companies also described salespeople as the ones responsible for identifying and taking advantage of new opportunities that arise with an existing client of the firm, ensuring the maintenance of an already established relationship.

The companies interviewed explained that this relational shift of the sales role is also reflected in the way they structure their sales process. While certain aspects of the process may differ between companies, the interviewees expressed that the main purpose is relatively the same: to follow the sales pipeline to ensure leads are converted into portfolio customers. Additionally,

most companies described the core basis of their sales process in a very similar manner, considering the following steps.

The initial stage involves utilizing multiple inbound or outbound methods to identify potential customers or leads. For example, Sierra has a specific team that directly works with multiple markets and is responsible for prospecting. In addition, the company promotes events to strengthen this acquisition. On the other hand, Tango prefers to directly target and reach out to competitor clients, close to the end of their contract, or those under direct management.

Following this phase, the lead is qualified. Within this step, an initial point of view of the lead is created. Companies describe collecting and registering initial information, from multiple external data sources, on the necessities and budget of the potential customer, and assessing if the company has an offer that fits their needs. For example, in company Sierra, a relationship map and a scorecard of the potential customer are created. The first one is used to understand all the stakeholders involved and the second to collect all the information possible on the customer before entering into any negotiation. The company Hotel SM considers this as the phase where the company evaluates if the lead has the potential to become a client. As said by the manager: “The lead is qualified, we qualify the necessities. If they say that they want to rent 10 Porsches 911, but I don’t have 10 Porsches 911, I won’t answer, since I can’t satisfy that need.”

As mentioned by Sierra LSE “If the lead is qualified and has the potential to turn into a client, it becomes an opportunity and the salesperson starts nurturing the relationship.” So, in the next step of the process, business opportunities are explored. Companies consider that the seller adopts a consultative approach and, through meetings and in-depth discussions, seeks to profoundly understand the customer’s challenges, objectives, how they work and what they need, so that he can provide the best solutions that fit the customer. Usually if the client has already done business with the company, the selling process starts in this phase, with the surging of a new opportunity. According to Tango SE, once a customer is already loyal to the company, lead prospecting and qualifying phases are not necessary, since the first contact has already been established and the relationship nurtured. The information collected from this continuous communication helps the company complement and refine the data gathered in the previous stage. For the case of company Sierra, it helps them update the relationship map and customer scorecard.

The next phase is all about proposing solutions and demonstrating value to the customer. Company Sierra presents multiple demonstrations, to showcase the advantages and the value of having that offer implemented. Additionally, company Mike displays success cases with other customers from the same industry to better explain the value of their solutions. At this stage, the interviewees describe working with the customer to understand which solution best suits their needs and solves their problems. The willingness to present the best possible offer to the

customer and to nurture the relationship culminates in a final proposal where the value demonstrated is enough to satisfy the customer. As mentioned by Sierra SE, “the negotiation phase, where we’re supposed to present our final proposal, confirms the implementation partner, the engagement, and the strategy, having all things approved from our side and guarantee that the customer buys.”

With the final proposal presented, companies finalize terms with the customer and negotiate prices. Once the potential client agrees with the proposal and signs it, the opportunity is converted and the deal is secured and closed. As stated by company Hotel SM, “from there the deal is closed, becoming a portfolio customer.”

When the deal is closed, companies focus on implementing the solution. Some firms make the implementation themselves while others utilize partners. After the sale has been made, relationships must continue being nurtured daily. Company Mike SM considers ongoing customer support and identification of new opportunities as two essential steps to ensure this maintenance.

For the interviewees, the adoption of the customer-centric strategy increased the complexity of the selling process. Rather than realizing just a simple transaction, the pipeline is considered to have become cyclical in nature. As mentioned by company Hotel ITM “The sales process doesn’t end with the close, it ends in captivating the customer again and returning to the beginning of the process, over and over again.”

AI-CRM impact on Sales Processes and Relationship Development

According to the companies interviewed, with the rise of technology, multiple digital tools were developed and adopted, making sales, marketing, and service teams heavily reliant on technological systems to carry out their processes. One of the tools mentioned is CRM, which is reported to have a crucial role in centralizing all customer information, helping firms interact with the customer in a better way.

As explained by Sierra LSE:

“As a company that develops CRM systems, we’ve established a platform that basically takes in all different sources of data from marketing, sales, and post-sales teams (...), then unifies all the information and ends up transforming that information into insights that are easy to read by the different teams that work there.”

As stated by the companies that developed this strategic tool, there are multiple modules, each with specific functionalities aligned with the needs of each commercial team. Companies can opt to acquire all modules and make up a dashboard that provides a 360° degree vision of the client’s

life cycle or integrate just part of those systems. Of all the companies interviewed, all described having a sales CRM module.

Beyond centralizing data, companies showcased that other reasons for the adoption of this module are to streamline sales tasks, to facilitate decision-making, and to better interact with the customer, by leveraging operational, analytical, and collaborative features. As explained by the SM from company Golf, by integrating a CRM system the sales process went from a non-digitalized set of stages that required a lot of effort to a modernized pipeline.

As referred by both Sierra and Mike, CRM systems are continuously evolving, suffering updates and modifications. Company Sierra LSE specified that “once we have the foundation created, there’s a series of other modifications that will emerge.” The ones most mentioned by companies were the integration of multiple channels, such as LinkedIn, applications, and websites into the CRM system creating a holistic and interactive system that can acquire data from multiple touchpoints, and the adoption of AI.

Although recent, there are already companies that have adopted AI-CRM systems. There are two main ways companies can combine AI into CRM systems. Either by acquiring a solution which already has AI integrated, from companies such as Sierra and Mike, or by merging their own AI systems and chatbots into it. While company Golf opted for the first option, obtaining an AI-CRM system from company Mike, company November opted for the second, integrating their own AI systems into a company Sierra solution.

Furthermore, there are also companies with the intention of introducing these systems in a short-to-medium time frame, having already a vast knowledge of the technology and its implications. This is the case with the companies Tango and Hotel, with the first having already finalized the purchase of an AI-CRM solution while the second expects to acquire AI-CRM functionalities in the medium term.

Multiple interviewees explained that they believe the integration of AI into CRM systems has the ability to positively impact the whole customer cycle influencing marketing, sales, and post-sales. According to both Sierra SE and LSE, there are three main capacities companies intend to leverage with this adoption.

- The first one is the predictive capability of AI which, by collecting and analyzing large datasets, can provide insightful forecasts. Companies consider that predictive models have been around for multiple years, proposing up-selling or cross-selling strategies based on customer information (Sierra SE) and calculating the probability of a customer churning (November SM). However, with the adoption of AI, interviewees pointed out that predictive functionalities expanded, becoming more sophisticated, precise, and personalized, individualizing each customer.

- Secondly, it is important to consider the generative ability of AI, which essentially helps with the creation of new content. As referred by company Golf SM and company Sierra SE, this capacity can have an important role in writing emails, summarizing information, etc.
- Lastly, there is the automation potential of AI. For Sierra SE it consists of a set of agents trained to mimic human actions, realizing a specific action in a really efficient manner and allowing people to focus more on important tasks.

Secondary data revealed that while generative and autonomous AI may overlap, the first provides content and requires the validation from a human, such as writing an email, while the second realizes an action, often without human intervention, such as generating leads.

For Sierra LSE, all these capacities have made the company AI-CRM solution the fastest growing system in the company's history, providing better benefits than any previous versions. According to the people interviewed, by integrating such capacities the potential of AI-CRM systems can expand previous CRM functionalities and play an important role in influencing companies' sales processes.

Based on the information collected on the interviews and secondary data, it is possible to identify that AI-CRM boosts efficiency. Company Mike SM notes that within the company and the customers that have acquired their AI-CRM solution "there was a 30% average time reduction loss in administrative questions, 20% regarding the integration of AI in CRM". As mentioned by the company Golf SM, by automating manual and repetitive tasks, "such as email drafting and summarization, reunion synopsis, documents generation", AI-CRM makes the sales process faster and more agile. Additionally, as verified by both Delta Sales Consultant (SC) and Tango ITM, it can also generate and qualify leads, collecting and providing a set of relevant information on a certain potential client and forwarding them to a salesperson. Delta SC highlights that this allows salespeople to be focused on nurturing the relationship as "the agent gets way more available time, because 80% of the job is done. And then he only needs 20% to focus on what really matters."

Moreover, due to its ability to analyze large amounts of customer data and drive insights from such information, AI-CRM is considered to play a crucial part in helping salespeople make decisions. Sierra LSE notices how important this analytical power can be by stating that "the system analyzes amounts of data no human could ever analyze and gives recommendations that make people look at things they would never look at otherwise". Delta SC described an implementation of a use case where, by analyzing customer information, AI could generate a personalized Next Best Action, helping the salesperson understand, in a specific interaction, what would be the best course of action to take (e.g., personalizing the offering, up-selling or cross-

selling, offering a discount, etc.). When it comes to churn, November SM states that AI-CRM can detect patterns which allow it to make predictions whether client satisfaction is degrading. This predictive power not only plays an instrumental role in making such estimations, but it was also noted that it has the ability to forecast sales outcomes, future trends and market opportunities, and the possibility of a lead becoming a sale. Sierra SE describes how AI-CRM can tell the opportunities that have a higher chance of closing and can also showcase how much he thinks the volume of business will be throughout a certain period. Mike SM doubles down with “it allows you to know exactly how you are in terms of market share by generating your performance metrics”.

AI-CRM was also considered a significant tool in improving sales effectiveness, increasing conversion rates. Company Sierra LSE explained that “If I’m more efficient, if my communication is more efficient and personalized, if I’m more productive, usually, or in most cases, it allows me to deliver a more memorable experience and that translates into sales effectiveness”. In addition, as noted by Sierra SE, AI-CRM can also work as a sales coach detecting certain limitations in the salesperson and training them to sell better. As showcased by company Mike SM, the adoption of AI-CRM by companies brought an increase, on average, of 20% more sales.

Another aspect mentioned by some interviewees is the enhancement of data centralization and collaboration within the sales team. The centralization of information within CRM systems provided salespeople with a complete view of the customer. However, as explained by Hotel ITM, sometimes people do not feed CRM systems with the totality of the information, making them inefficient and this is another benefit AI can bring, as this technology has the ability to collect large amounts of data and share information in a more efficient and accurate way. Sierra LSE adds that it allows each salesperson to understand what was done in previous stages, improving all interactions with the customer. Furthermore, as stated by Hotel ITM “AI can bring some input to help us understand, through external elements, that we aren’t performing a certain task as well as we should”. He explains that having an external element, rather than an internal element, analyzing the insufficiencies within the sales department can better ensure, by avoiding conflicts, that the team is working towards a shared goal, enhancing cooperation.

Additionally, AI-CRM systems were pointed out as being able to enhance customer retention by improving sales follow-ups. As noted by company November SM, information is collected across all stages of the sales process which can help AI identify follow-up actions, such as solution up-sell or cross-sell, or completely new opportunities with a client. Finally, AI-CRM, through the use of 24/7 integrated chatbots, can interact in real time with the customer, answering questions, handling complaints, and collecting data. As identified by Delta SC, AI can prepare a

personalized answer for each request or, if unable to solve a problem, can transmit the information and collaborate with a sales or support member.

While all interviewees agreed that these benefits influence most or all stages of the sales process, there was slight disagreement regarding which phases are most impacted. Some argue that certain steps are less affected, highlighting that the impact mostly affects the stages of prospecting, lead qualification, opportunity development, and follow-ups. Delta SC argues that:

“(…) from the moment you’re working on a transaction for a client, then it’s going to be price themes, offer themes, and there, Artificial Intelligence won’t do much. But I think that in the previous process of feeding the sales pipeline, the topic of AI can be very interesting in the creation of more leads, generating more to feed the pipeline.”

Others assert that AI-CRM has a significant, direct or indirect impact across all stages of the sales process, from lead acquisition to follow-ups. Sierra SE states that AI increases capacities “from prospecting, to researching, to obtaining information, to writing emails, summarizing, suggesting offerings, forecasting, solving problems, etc. In other words, from predictive to generative you can use it throughout the whole process.”

According to the people interviewed, by making the sales process more efficient, effective, and insightful, AI-CRM provides a significant role in helping salespeople nurture successful customer relationships. As mentioned by Delta SC “Those on the other side, have an immediate perception that there is a vast knowledge of who they are, and this can create a very positive relationship.” For companies, all of the benefits that this system provides allow the salesperson to focus more on building trust and commitment, understanding the client’s needs, and effectively communicating and handling problems. Therefore, as stated by company Hotel ITM, “we get to know more about our clients, their needs, and this will help us create loyalty and retain customers.”

Despite the benefits mentioned, some interviewees noticed that AI-CRM systems are still in their early stages, with great room for improvement. Companies Golf and Tango explain that although many benefits are already present in the system, it is still somewhat reductive and some capacities require improvements to add even more value. For example, both companies mentioned that in terms of efficiency and predictive analytics, AI can evolve a lot. Company Golf SM explained that, while already delivering crucial insights, companies’ want an agent that

“(…) can cross-check vast amounts of information from multiple sources, that brings all these pieces together, which complaints are we receiving, what trends are there, what kind of profile are the clients of this segment having, to deliver hyper-personalized insights and to increase efficiency to the maximum.”

Company Sierra and company Mike have also noticed that and are continuously working to improve the current functionalities and introduce new features to create a system that substantially improves all commercial processes and allows companies to evolve and nurture relationships faster and in a better way.

Limitations of AI-CRM

For the companies interviewed, two dimensions of challenges were particularly mentioned. The first one regards human challenges.

Within this realm, resistance to change and the possibility of losing jobs were considered the most prominent obstacles. As mentioned by Tango SE “any change that is made will have an initial phase where people resist. There’s always resistance. It’s an immutable factor.” AI-CRM is still a pioneer system thus multiple companies are still waiting for a more mature phase to adopt them. Sierra LSE explains that it consists of a certain cultural hesitancy, where companies prefer to wait for others to implement it first. Moreover, the possibility of losing jobs makes people more recessive to adopt and use such systems. Company Charlie ITM presented a case where if we are not careful when introducing AI systems, using them as a tool to substitute humans and save some money on salaries, it can lead to a world where economy collapses since people will not be able to make purchases, leading companies to go bankrupt.

Secondly, it is important to consider technological obstacles. For companies, such hurdles include data privacy concerns, integration complexities with other systems, and ensuring information reliability. AI-CRMs collect vast amounts of data which can impose privacy and security risks. Delta SC explained that systems today may know too much about the customer which can create a feeling of privacy violation. Additionally, since a lot of customer data is collected, without the correct security measures, information can be leaked, stolen or sent to third-party companies. Moreover, data input may not always be accurate, resulting in biased or incorrect system predictions. As mentioned by company Golf SM “you can’t take the risk of having teams working based on wrong presupposes and incorrect information.” Mike SM adds that this can create a feeling where teams have difficulty trusting in the insights given by AI. Furthermore, complementarity with other systems must exist as nowadays technologies are required to integrate with each other, creating a complex IT infrastructure.

To fully leverage the positive impact of AI-CRM, companies have shown the need to overcome previous challenges. To address the human difficulties, Hotel ITM stated that companies must adopt a posture where they provide continuous training to employees and emphasize AI as a collaborative tool, rather than a replacement. To handle the technological issues, Golf SM explained that “we must have tools that control what is resulting from these systems is right, ensuring all insights produced are trustworthy, secure and robust.”

Discussion

Relationship Development

As mentioned in the case study, companies can take on a variety of relationship approaches. However, within the firms interviewed, a clear focus on establishing partnerships with customers is verified. This aligns well with the theories of Morgan & Hunt (1994) and Whipple *et al.* (2010) which emphasize the duality of transactional and collaborative relationships.

Throughout the industries where the companies analyzed operate, information sharing, personalization, and cooperation have become highly valued. Therefore, it is possible to extract that, within the interviewed companies, a shift from a purely transactional and short-term approach towards a more collaborative and long-term vision was crucial, ensuring alignment with these aspects. By adopting a more customer-centric and relational approach, companies intend to better satisfy client needs and achieve customer loyalty. This has been confirmed by multiple studies, where firms take part in developing collaborative relationships to achieve greater-end customer satisfaction (Ryding, 2010; Whipple *et al.*, 2010). Nonetheless, this change does not happen in an instant. It requires a thoughtful and incremental plan where each company gradually progresses towards developing complex and long-term relationships with customers (Peppers & Rogers, 2000).

With a numerous and diverse portfolio of clients, companies need to examine the existing and potential customer base and identify which forms of segmentation are most appropriate (Payne & Frow, 2005). In the case study, it appears that organizations' segmentation techniques are mostly based on the size of the customer's firm. With such a heterogeneous range of clients, it becomes challenging for firms to develop profound partnerships with each other. Resources are scarce and so firms have to decide which customers need a higher focus and involvement. Hence, for smaller clients, it can be inferred that the company's approach consists of a more conventional, indirect, and massified perspective, but one that still has a basic, relational point of view. For larger customers, which are highly valued, companies adopt a direct and personalized approach aiming to fully understand and satisfy client needs and develop a successful prolonged relationship (Peppers & Rogers, 2000).

Despite the shift towards a more relational paradigm, it is possible to identify that a transactional foundation is still present within each and every company interviewed. Therefore, rather than a substitution, transactional and relational perspectives seem to complement each other (Fruchter & Sigué, 2005; Coviello *et al.* 2002). However, with a vision and a strategy centered on the customer, transactions are no longer seen as the result of a short-term conventional relationship, but rather a cyclical outcome of a successful long-term partnership. Hence, this paradigm change

does not just improve the connection between the buyer and the seller. It also plays a crucial part in improving companies' economic performance (Viio & Gronroos, 2014; Whipple *et al.*, 2010). Beyond the dual approach to relationships, this idea of correlation seems to combine well with Walter *et al.* (2001) framework. By leveraging both relational and transactional aspects, companies develop high-performance relationships exploiting direct benefits, such as profit generation, and indirect benefits, such as access to new clients or customer knowledge. These connections attach a very high strategic value for the seller (Walter *et al.*, 2001).

Besides the changing dynamics of marketplaces, the need for a more relational approach also stems from changes in the competitive landscape (Morgan & Hunt, 1994). Within the industries analyzed, competition has gotten fiercer and thus companies have to ensure customers remain loyal to them. Retention and loyalty have become the main goals for companies when developing relationships with customers. By achieving such determinant factors, companies ensure customers stay connected with the firm, with no intention of switching to competitors (Oliver, 1999). Additionally, loyal customers can play an important promotional role helping the firm establish other commercial relationships (Walter *et al.*, 2001). Moreover, it is explained that the costs of retention are usually lower for both the company and the customer (Oliver, 1999). On the one hand, customers reduce costs since they will not have to change to another company, as market research and implementation require large costs. On the other hand, companies reduce costs since they will become more stable, cutting the need to invest additional capital in their commercial efforts. Although the respondents revealed a crucial focus on retaining customers, it is also worth mentioning that the desire to continuously grow and connect with new clients remains, given that success comes from the appropriate trade-off between benefiting from a loyal portfolio of customers and exploring new commercial opportunities with different clients (King *et al.*, 2016).

To achieve an outcome of loyalty, it becomes clear that multiple factors need to be nurtured throughout the development of the relationship. Five key factors emerged from the interviews and those include: customer satisfaction, trust, commitment, effective communication, and problem handling. These coincide with multiple studies, such as Zegullaj *et al.* (2023), Hakim & Hakim (2017), Ogbeide & Ikande (2021), Ndubisi (2007), and Khan *et al.* (2020), which emphasize these aspects as some of the most crucial to fulfill customer loyalty.

Companies show that satisfaction is fulfilled by understanding customers' needs and providing exceptional value, through quality and specific soft adaptations, even to the point of exceeding expectations (Ryding, 2010). By being focused on satisfying the needs of the customer, companies believe that clients will buy more, resulting in new business opportunities. However, while satisfaction was usually the first element that came to the mind of the interviewees, it was considered insufficient to develop a successful relationship that results in customer loyalty. As

seen in Oliver's study (1999), satisfaction plays an important role in driving loyalty, especially in the earlier stages. However, satisfaction alone is not enough to achieve it.

Thus, trust and commitment were also mentioned several times. Trust as the capability to demonstrate reliability and integrity, and commitment as the will to warrant maximum efforts towards the other party (Morgan & Hunt, 1994). Additionally, excellent communication and the ability to resolve problems were also highlighted. By keeping in touch, providing timely and trustworthy information, and openly discussing solutions when conflicts arise, companies can become closer to their customers (Ndubisi, 2007).

Furthermore, innovation and alignment with customer values (e.g., sustainability and equality) also emerged as pivotal elements for some companies. The incremental improvement of companies' products and services and compliance with clients' ethical goals helps companies deliver unique offerings.

The factors mentioned above are interconnected, mutually improving each other. By continuously nurturing them, companies can achieve customer loyalty and develop successful long-term relationships.

Sales Process linkage to relationship development

It is reasonable to conclude that the shift from a transactional to a more relational orientation led to a change in the sales paradigm, ensuring a stronger focus on relationship selling (Viio & Gronroos, 2014; Idzikowski *et al.*, 2019). Thus, to make sure a correct alignment with a relational perspective would be made, several new sales approaches emerged. What started out as an individual selling approach, where a single interaction between a buyer and a seller would take place, evolved into new selling methods, such as the buying center, adaptive selling, and customer orientation and solution selling (Arli *et al.*, 2018).

Within the companies interviewed, a moderate alignment with the buying center and adaptive selling approaches is verified. On the one hand, the use of relationship maps showcases the importance of targeting multiple stakeholders within an organization, addressing multiple roles (Borg & Young, 2014), which combines well with the buying center method (Plank & Dempsey, 1980). On the other hand, the collection of information on the customer helps salespeople adapt the way they sell to better suit the customer behavior, which seems to be compatible with the adaptive selling approach (Viio & Gronroos, 2014).

However, companies went beyond these methods, demonstrating a clear emphasis on customer orientation and solution selling. Firms no longer sell just to secure a transaction, navigate buying centers, or adjust the selling techniques used, but also to guarantee, develop, and maintain long-term relationships with profitable customers achieving retention and loyalty (Moncrief &

Marshall, 2005). Therefore, with the increased focus on the customer (Arli et al., 2018), more than just generating revenue, sales play an important role in nurturing relationships.

Hence, the shift within the sales approach has transformed salespeople's roles, causing an adjustment in the way they perform their jobs (Anderson, 1996). As the primary line of contact with the customer, salespeople's efforts have moved beyond the traditional perspective, focused on closing deals without paying attention to buyers' needs (Borg & Young, 2014), towards fostering long-term relationships.

The findings reveal that salespeople prioritize nurturing customer loyalty drivers, playing a crucial role in satisfying clients, building trust and commitment, communicating effectively, and handling problems. Instead of pushing a product/service onto the customer, salespeople act in a consultative manner, seeking to understand clients in a better way, building value over time, and delivering the best possible solution that meets buyers' specific necessities (Moncrief & Marshall, 2005). Overall, salespeople are working with customers to develop solutions that enhance benefits for both firms (Arli *et al.*, 2018). Additionally, salespeople have also become responsible for maintaining successful relationships, providing additional support, and identifying new opportunities with portfolio customers.

Furthermore, to ensure sales professionals perform sales with the center of execution being the customer, the adoption of the customer-oriented method has also led to a restructuring within the companies' sales process, shifting traditional phases into evolved ones (Moncrief & Marshall, 2005). As stated in the case study, each company had their own specific process. However, by analyzing each one, it was verified that the core basis and purpose were relatively the same and, consequently, a standard pipeline was defined. **Figure 2, present in Appendix A**, demonstrates a simplified version of the several stages identified which help salespeople nurture customer loyalty drivers and develop successful long-term relationships with buyers. While the image presents the sales process as a linear sequence of activities, it is important to refer the fact that they do not necessarily follow any specific sequence (Moncrief & Marshall 2005).

The process starts off with the traditional Prospecting stage. This phase consists of identifying potential customers or leads to expand the company portfolio. To do it, several inbound or outbound methods are used, including digital technologies, events, or direct outreach. However, while the salesperson used to be the one responsible for searching and identifying potential buyers (Dubinsky, 1981) it was identified that this role is now being conducted by others in the organization, with the salesperson having little influence on it (Moncrief & Marshall 2005). Nevertheless, it is still a crucial aspect within the sales process as it provides the leads that can later be transformed into portfolio customers.

After identifying the lead, the process moves on to Lead Qualification. In this stage, the salesperson collects specific information on the prospect's needs and interests, stakeholders

involved in the transaction, and budget (Dubinsky, 1981; Rutherford & Matthews, 2024), which helps them determine an initial perspective of the potential customer and whether it is possible to satisfy its necessities. With the help of technology, this stage has gotten more efficient as the salesperson can acquire all the information needed faster than ever before. According to the interviewees, qualifying the lead means identifying if it is beneficial to negotiate and try to establish a relationship with the potential customer. If the lead does not classify as relevant, it is discarded or revisited if the company can later satisfy its needs. Otherwise, the prospect becomes an opportunity.

Consequently, the next step is Opportunity Discovery and Development. At this stage, negotiations with the customer are initiated with the purpose of deeply exploring the needs, challenges, and objectives of the potential buyer (Moncrief & Marshall, 2005). Additionally, the drivers of customer loyalty begin to be nurtured. Within this phase, it can be observed that a consultative approach is adopted to continuously communicate and collect more information on the customer, in order to refine the perspective previously built in the qualification section, so that an effective solution can be later implemented. Furthermore, it is considered that, for portfolio customers, the sales process starts at this phase, with the surging of a new business opportunity.

After establishing the full customer picture, salespeople begin Proposing Solutions and Demonstrating Value through personalized demos or successful use cases. However, rather than just demonstrating offerings strengths and functionalities (Dubinsky, 1981), the goal is to provide crucial information to illustrate how the solution solves existing needs and problems. Furthermore, while a traditional approach results in salespeople pushing and convincing the buyer to acquire the first offer proposed, within the companies analyzed it is possible to verify that sales professionals work with the customer over time, continuously adding value to the offerings presented until the best possible solution, which results in both parties being satisfied, is achieved (Viio & Gronroos, 2014).

When the final proposal is established, a step known as Close and Add to Portfolio is carried out. In this stage, the salesperson finalizes the details of the transaction and negotiates prices (Rutherford & Matthews, 2024). If the customer agrees with the final terms, then the opportunity is converted and the deal is secured and closed. Nonetheless, “The key goal of this step has moved beyond simply short-term physical closure to the successful realization of the mutual goals of both parties to the relationship, over the long run” (Moncrief & Marshall, 2005).

Finally, once the deal is closed, companies enter the stage of Follow-Up. In this phase, firms focus on implementing the solution and maintaining the relationship. Within the interviews, two key steps are mentioned. The first is verifying if the customer is benefiting from what is promised and providing ongoing support to ensure satisfaction and loyalty. The second one revolves

around finding new opportunities to engage with that customer. Most examples provided by the companies specify the idea of up-selling and cross-selling solutions.

Although some aspects of the traditional sales process continue to be present within the companies, the relational shift within the sales paradigm paired with advancements in technology has led each of those stages to be approached in a different manner. Hence, rather than pursuing the phases just to achieve a transaction, salespeople follow them to ensure that trust and commitment are nurtured and to achieve a solution that satisfies the customer's needs (Arli *et al.*, 2018). Additionally, a sense of collaboration is also established through ongoing communication, problem solving, and by seeing the customer as an active partner rather than just a passive participant influencing offers (Ndubisi, 2007). Through this process, companies create and deliver value to the customer, playing a crucial role in building the foundation to achieve loyalty. Beyond the modifications within the phases of the sales process, the pipeline, as a whole, has also changed, moving from a one-time linear approach, starting with prospecting and ending with the follow-up, towards a long-term cyclical process where the sequence of activities happens repeatedly and may not always follow the same order (Rutherford & Matthews, 2024). Therefore, it is possible to visualize that the standard pipeline defined presents a high similarity with Moncrief & Marshall's (2005) evolved sales process.

By analyzing the multiple companies interviewed, it is possible to conclude that the adoption of the customer-oriented and solution selling approach has brought changes to the sales process and to the salesperson role. These modifications help companies align sales with a more relational perspective, enhancing customer loyalty and improving firms' performance.

AI-CRM impact on Sales Processes and Relationship Development

To support sales, marketing, and customer service teams adjusting towards a customer-oriented strategy, multiple technological tools have been adopted. One of those integrations is the CRM system, as a way to face the wide dispersion of customer data. This technology plays a key role in centralizing information, helping teams manage customer relations in a better way (Idzikowski *et al.*, 2019; Rodriguez *et al.*, 2018).

As seen in the case study, within CRM systems there are multiple modules and while some companies have acquired the whole set, which led them to obtain a complete view of the customer journey, others adopted just a portion of it, leveraging specific functionalities adjusted to the needs of the company. The integration of the sales CRM module and other technologies has directly contributed to the improvement of sales operations (Tanner Jr. *et al.* 2005), turning the manual and fragmented sales process into a digitalized set of stages.

Within this module, beyond data collection and storage, operational, analytical, and collaborative features are utilized (Rehman *et al.*, 2025; Dubey *et al.*, 2020). Thus, besides centralizing

customer information, it is verified that traditional CRM systems also provide other benefits, albeit in a basic way. Advantages include the improvement of efficiency by automating certain tasks (Rodriguez & Honeycutt Jr., 2011; Rodriguez *et al.*, 2018), better decision making due to the delivery of some forecasts (Rodriguez & Boyer, 2020), regarding churning and additional selling opportunities, and the enhancement of effectiveness and collaboration (Guerola-Navarro *et al.*, 2021; Tanner Jr. *et al.*, 2005; Rodriguez & Honeycutt Jr., 2011). However, it is possible to confirm that CRM tools do not always work the way they should due to people failing to provide accurate or sufficient data.

Over time, it is observed that traditional CRM systems have continuously evolved, with more modifications being made and new features being introduced. As seen in the case study, the most recent introductions have been the multi-channel integration, where by combining multiple detached channels such as mobile applications, social media, and websites it is possible to make CRMs more interactive and holistic, facilitating data acquisition and enhancing the communication between the buyer and the seller (Shen *et al.*, 2018; Agnihotri *et al.*, 2017; Rodriguez & Boyer, 2020), and the adoption of AI which provides a range of new opportunities and benefits for marketing, sales and post-sales (Gaczek *et al.*, 2023).

As explained in the case study, companies have begun to introduce or are willing to adopt AI-CRM systems in a short to medium time frame to take advantage of predictive, generative, and automation-related AI capacities (Hermann & Puntoni 2024; Hou *et al.*, 2024), expanding previous CRM features and introducing new functionalities.

While traditional CRM systems already had a basic degree of predictive power, the integration of AI has significantly enhanced it, providing teams with deeper and more accurate insights (Yoo *et al.*, 2024; Saura *et al.*, 2021). In the same way, CRM systems were already developed to perform certain tasks automatically. However, the generative and automation-related features of AI have brought a completely new optimization capacity making commercial processes much more efficient (Chen & Zhou, 2022), by creating new information and automating several tasks.

The adoption of the AI-CRM sales module has had a significant positive impact on companies' sales processes. **Table II** summarizes how the main benefits of this system are achieved by providing examples of functionalities mentioned in the case study or taken from secondary data.

Table II: Influence of AI-CRM tools on Sales Processes and how it is achieved

Influence on the Sales Process	How it was achieved by AI-CRM tools	Examples of AI-CRM functionalities (Case Study + Secondary Data)
Boosted Efficiency	AI-CRM automates manual administrative tasks (Yoo <i>et al.</i> , 2024;	Email Drafting and Summarization
		Reunion Synopsis

	Chen & Zhou, 2022) allowing salespeople to be focused on more important stages of the sales process.	Schedule Appointment
		Document Generation
		Prospecting (either Inbound or Outbound Leads)
		Data Collection (e.g., Lead Qualification, Opportunity Development, Follow-ups)
		Opportunity Summarization (i.e., summarizes all actions that have happened between the salesperson and the customer)
Enhanced Decision Making	By analyzing massive amounts of customer data (Chatterjee <i>et al.</i> , 2021), the system provides crucial insights helping salespeople deliver personalized offers and interact better with the customer, turning prospects into buyers (Yoo <i>et al.</i> , 2024; Saura <i>et al.</i> , 2021; Rahman <i>et al.</i> , 2023; Chen & Zhou, 2022)	Identifies customer needs, likes, and dislikes
		Detects churning
		Identifies up-sell, cross-sell or completely new sales opportunities with a portfolio customer
		Generates the next best action (e.g. personalizing the offer, offering a discount, meeting with the customer, sending an email, etc.)
		Forecasts sales volume
		Measures the possibility of closing a sale
		Detects future trends and market opportunities
Improved Effectiveness	By making salespeople more productive and by providing paramount insights, AI-CRM helps deliver a better customer experience, which translates into higher conversion rates (Chen & Zhou, 2022; Rahman <i>et al.</i> , 2023)	Previous Efficiency and Decision-Making Benefits
		Coaching salespeople (i.e., AI-CRM can detect salespeople weaknesses and provide recommendations to make them better sellers)
Refined Data Centralization and Enhanced Collaboration and Cooperation within the	AI-CRM collects and centralizes massive amounts of data, throughout the sales pipeline, in a more efficient and accurate way than manual input, which makes it easier for different salespeople to access shared information and understand what is	Collects large volumes of data from each stage of the sales process
		Facilitates the sharing of information within the sales team or with other departments
		Acts as an external element that analyzes and informs salespeople

Sales team	done in different stages, enhancing collaboration (Chatterjee <i>et al.</i> , 2021). Additionally, by analyzing and informing salespeople about their insufficiencies within the team, it ensures everyone is focused on working towards the same goal.	about their insufficiencies, reducing conflicts
Provided follow-up opportunities	By analyzing large amounts of customer information, AI-CRM identifies major follow-up opportunities.	Identifies up-sell, cross-sell or completely new Sales opportunities with a portfolio customer
Strengthened customer interactions and post-sales support	The integration of chatbots within the AI-CRM system provides a support tool for communicating with the customer and solving customer problems (Pallathadka <i>et al.</i> , 2023; Chen & Zhou, 2022)	Interacts, in real-time, with the customer throughout the sales process (e.g., Communicates with inbound leads, answers questions)
		Provides after-sales support (e.g., Handles complaints, solves problems)

The analysis of the information collected from the interviews has provided two crucial insights regarding the literature review. First and foremost, the benefits caused by the AI-CRM sales module are similar to the ones found in traditional sales CRM, showcased by studies such as Guerola-Navarro *et al.* (2021), Rodriguez & Honeycutt Jr. (2011), Rodriguez *et al.* (2018), Tanner Jr. *et al.* (2005), and Rodriguez & Boyer (2020). However, the impact AI-CRM has brought to the sales process is significantly greater. Secondly, while previous research from Chen & Zhou (2022), Chatterjee *et al.* (2021), Yoo *et al.* (2024), Saura *et al.* (2021), and Pallathadka *et al.* (2023), contributed with some information on the general influence of AI-CRM, it is possible to understand that it lacks detail on how the AI-CRM sales module actually impacts the sales process and the capacities and functionalities it has brought to the sales context.

As verified in the case study, multiple, if not all, stages of the sales process are influenced by the positive impact of AI-CRM. However, when it comes to which phases were most affected, two different opinions were observed. Some consider that, either directly or indirectly, every step of the sales pipeline is significantly improved by this technology. Others recognized that certain stages are only marginally influenced, emphasizing prospecting, lead qualification, opportunity development, and follow-ups. The latter opinion aligns with Moncrief & Marshall's study (2005), where technology mostly impacts the equivalent stages to the ones mentioned above.

The introduction of AI-CRM has made the sales process more efficient, effective, collaborative, interactive, and insightful. This positive impact ensures that salespeople adjust even more

towards the customer-centric approach. While previous research by Nguyen *et al.* (2020), Rodriguez & Boyer (2018), Jani & Han (2014), and Agnihotri *et al.* (2017) already showcases the contribution of traditional CRM for helping salespeople develop long-term relationships, the integration of AI takes it a step further. The enhancement of efficiency allows the focus to be on nurturing trust and commitment, the delivery of personalized insights enables the satisfaction of customers' specific needs, and the in-real time interaction, the strengthening of collaboration, and improvement of follow-ups ensures an effective communication and fast problem handling. By strengthening these factors, a solid foundation for loyalty is established.

Although many benefits are identified across the interviews, the information confirms that there is still a lot of room for improvement. AI-CRM tools are still in the early stages of development with many features yet to be introduced. Consequently, it can be established that current systems are still somewhat reductive when it comes to enhancing efficiency and providing knowledge. Therefore, AI -CRM developers must keep adding improvements to provide a system that maximizes efficiency and delivers hyper-personalized insights.

Limitations of AI-CRM

As seen by Yoo *et al.* (2024), multiple companies are failing to effectively integrate AI systems. Within the case study, it is possible to understand that to leverage the beneficial impact of AI-CRM, firms need to overcome two main types of challenges: human and technological. **Table III** provides specific examples for each of these categories and how to overcome them.

Table III: Categorization of Human and Technological Challenges in AI-CRM adoption

Category	Challenges	How to overcome
Human	Whenever a new technology is introduced, there is always some resistance within the firm (Chen & Zhou, 2022; Chatterjee <i>et al.</i> , 2021; Kale, 2004).	Companies must provide continuous training and introduce AI-CRM not as a substitute, but as a complement that helps employees be more efficient and serve the customer better
	People may refuse to utilize AI-CRM systems with a fear of losing their jobs.	
Technological	AI-CRM may collect too much customer data, raising privacy issues. Additionally, without proper security measures, information can be stolen and customer trust downgraded (Chen & Zhou, 2022; Kim, 2010).	Companies must adopt transparent behavior and develop data governance measures, ensuring data privacy, reliability, quality, and security.
	Data collected by AI-CRM may not always be reliable, which can result in incorrect previsions	

	making firms lose trust in the system (Kale, 2004).	
	Most firms rely on multiple technologies thus, AI-CRM systems must be correctly integrated into this complex digital ecosystem (Rahman <i>et al.</i> , 2023)	

By addressing both human and technological barriers, firms can ensure a successful integration of AI-CRM, enabling a positive improvement of the sales process and a stronger foundation to achieve long-term relationships and differentiate from competition.

Conclusion

The present article aimed to explore the influence of AI-CRM on companies' sales processes and, subsequently, on relationship development.

The study reinforces the ongoing shift from a purely transactional approach towards a more relational one, contributing to Relational Marketing Theory. Research shows that, in an ever more competitive world, firms prioritize the development of long-term relationships, fostering loyalty drivers, such as trust, commitment, satisfaction, effective communication, and problem handling. By showcasing that loyalty is a result of multiple factors, the article strengthens the theory of authors such as Ndubisi (2007) and Oliver (1999). However, findings indicate that firms do not equally engage with every customer. Instead, organizations place higher relational efforts towards more valuable customers, while following a more conventional approach, with a lower relational degree with others. Furthermore, the study highlights that the relational approach is not being introduced to substitute the transactional view, but rather to complement it. Both perspectives coexist, with transactions serving as a cyclical outcome instead of a one-time endpoint.

To align with this belief shift, research reveals that organizations introduced new selling methods, such as the customer-oriented and solution selling strategy, which led to changes within the salesperson role and the sales process structure. The results suggest that salespeople are now responsible for developing long-term relationships with customers and, to ensure this, sales processes have been revised into an evolved set of phases, as indicated in **Figure 2, present in the Appendix A**. These findings further expand the idea present in the work of Moncrief & Marshall (2005).

Within sales, CRM systems were adopted to support salespeople in carrying out the evolved phases of the sales process. The study explains that this technology evolved, with the latest trend being the integration of AI, forming AI-CRM systems. The empirical analysis showcased that the

AI-CRM adoption expanded previous functionalities, such as automation and predictive analysis, but it also introduced new ones, including real-time information generation. Research demonstrates that this system has had a significant positive influence on the various stages of the sales process, increasing efficiency, improving effectiveness, and making them more insightful, collaborative, and interactive. This has allowed salespeople to nurture the drivers of loyalty in an easier way, developing successful relationships with customers. These conclusions extend prior research on AI-CRM further reinforcing the idea that the integration of such systems is paramount for B2B firms' success (Chatterjee *et al.*, 2021; Rahman *et al.*, 2023). Nevertheless, to actually take advantage of AI-CRM and also benefit from future improvements, companies need to overcome human and technological challenges.

Additionally, the findings also made it possible to draw managerial implications. The establishment of long-term relationships, resulting in customer loyalty, can be more successful if firms understand the potential of AI-CRM systems. By equipping salespeople with these tools, companies ensure a more efficient, effective, and personalized realization of the sales process. The automation of manual tasks, refinement of data centralization, enhancement of real-time communication, and delivery of personalized predictions, positively influence all the steps of the process, allowing for a more consultative, customer-oriented role to be executed. However, for companies to fully benefit and, in the future, unlock AI-CRM full potential, organizations must correctly overcome human resistance, by providing continuous training and showcasing AI-CRM as a support tool, and technological constraints, by adopting transparent measures and integrating data governance.

Despite the insights conferred, the research is not without limitations. Firstly, AI-CRM systems can be adopted within sales, marketing, and customer service areas. However, the study scope only considers the influence of these tools on the sales process. Secondly, the study only analyzes the challenges of adopting this technology at a surface level. Delving deeper into human and technological constraints while also considering broader economical, ethical, and sustainability concerns is paramount, so that AI-CRM systems can be successfully integrated, benefiting not only companies but also societies. Thirdly, the findings are based on a small sample of companies. Including a wider range of firms would strengthen its validity. Finally, the cross-sectional timeframe of this research only explores the influence of AI-CRM as it is right now. Given that this system has still a great room for improvement as it currently sits at an early stage of its lifecycle, a longitudinal study could offer valuable insights on the way this technology evolves and the future benefits it may bring to the sales process, as new features are introduced.

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Appendix

Appendix A – Figures

Traditional seven steps of selling	Transformative factors	Evolved selling process
(1) Prospecting	Telemarketing Internet selling Organizational prospecting	(1) Customer retention and deletion
(2) Preapproach	Laptop account data Support staff	(2) Database and knowledge management
(3) Approach	Build a foundation	(3) Nurturing the relationship (relationship selling)
(4) Presentation	PowerPoint/multimedia Listening Team selling Multiple calls Value-added Buying centers	(4) Marketing the product
(5) Overcoming objections	Predetermining needs	(5) Problem solving
(6) Close	Identifying mutual goals	(6) Adding value/satisfying needs
(7) Follow-up	Increased effectiveness of communication through technology	(7) Customer relationship maintenance

Figure 1: The evolution of the seven steps of selling according to Moncrief & Marshall (2005)

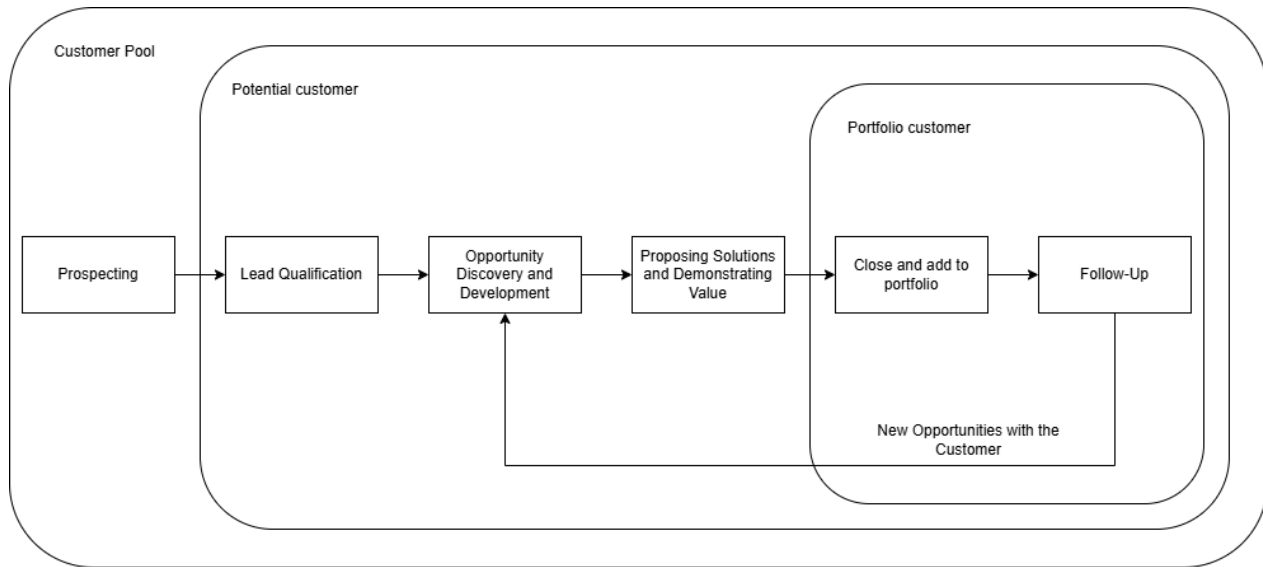


Figure 2: Standard Representation of the Sales Process derived from interviewed companies

Appendix B – Table

Table I: Overview of Case Study Companies and Interview Participants

Company Alias	Country of Origin	Most Prevalent Industries	Role with AI-CRM	Role of the interviewee
Sierra	United States	Software/CRM	Developer/Adopter	SE
				LSE
Mike	United States	Software/Technology	Developer/Adopter	SM
Delta	United Kingdom	Consulting/Professional Services	Implementer	SC
Hotel	USA	Mobility Services	Willing to adopt in a short to medium term	SM
				ITM
Tango	Portugal	Outsourcing/Facilities Management	Currently adopting	SE
				ITM
Golf	Portugal	Energy/Oil & Gas	Adopter (Acquired Mike's AI-CRM)	SM
November	Portugal	Telecommunications	Adopter (Merged in-house AI into Sierra's CRM)	SM
Charlie	Portugal	Construction/Engineering/Real Estate	Not ready to adopt yet	ITM

Appendix C - Interview Guide

Good morning/Good Afternoon

My name is Pedro Alves, I am currently attending a Master's Degree in Management and Industrial Strategy at the Instituto Superior de Economia e Gestão and I am doing a Dissertation on "The Impact of AI-driven CRM systems on modern B2B selling processes".

The context of this research focuses on exploring the impact of AI-CRM systems on companies' sales processes and, subsequently, how that impact affects the development of customer relationship in B2B markets.

In order to collect data to better understand this topic in a practical way and to expand on current existing literature, a semi-structured interview will be conducted and your answers will be fundamental.

It is worth noting that the interview will have a confidential nature and that every piece of information gathered will be merely used for academic purposes. If possible, I would be pleased if this conversation could be recorded so that I can later perform a deeper analysis on it.

Thank you in advance for your willingness to collaborate on this work.

Research questions:

- (1) How is AI-CRM propelling changes to the sales process?
- (2) How is AI-CRM affecting business relationship development?

Interview Guide:

Theme: Types of relationships

- 1. Can you describe your company's relationship portfolio? Would you say that your company focuses on a purely transactional approach or a more collaborative perspective, focused on developing long-term relationships with customers?**

"What we want are long-lasting relationships with our customers. Because we sell a platform for our clients to also have enduring and fantastic relationships with their clients." (Sierra SE)

"But as a company that sells to other companies, what we look for is to establish long-term partnerships." (Tango ITM)

- a. Does your company follow the same relational approach with every customer? Why or why not?**

"You have the small and medium businesses (...) and, in this case, the sales aspect is all done through partners. If we are talking about large clients (...), there is a Mike team that manages that process. That will allow us to accompany the client to a greater extent." (Mike SM)

- 2. What are the main metric or indicators your company uses to measure the success of a relationship?**

“Therefore, the main metrics (...) are the economic return of a contract and it is also understanding if the customer is satisfied or not.” (Tango SE)

“(...) we use the Average Order Value, which is the value a client is spending on the set of solutions they utilize. (...) and also, our relationship with the client depends on a set of touch point metrics that we have throughout the customer lifecycle.” (Sierra LSE)

b. Despite a more relational focus does the company still operate with a transactional foundation?

“(...) satisfying a customer and achieving loyalty is important, but without economic return the company isn’t satisfied, and there needs to be satisfaction on both sides.” (Tango SE)

“There is both a relational layer, (...) followed by a transactional layer which is essential for every company. (...) In other words, we have managed to minimize the focus on day-to-day negotiations by compensating with a relational component of trust, proximity and knowledge, which is highly valued by clients.” (Golf SM)

Theme: Relationship development and Customer Loyalty

3. Do you consider customer loyalty to be the main outcome of developing a strong relationship with the customer? Why is it important to achieve it?

“(...) the main purpose of all companies is to have loyal customers, (...) a company that wants to grow at a certain rhythm, if it has a good retention rate, can just fine-tune the commercial effort, having only a commercial team that is enough to replace any customer turnover it has.” (Tango SE)

“Yes, definitely. Loyalty ends up generating word of mouth. Companies (...) end up sharing their experiences with others (...). And I think that results in more business.” (Sierra LSE)

4. What factors need to be nurtured throughout relationship development to ensure customer loyalty is successfully achieved? Would you say it is primarily satisfaction, or are there other key aspects implied?

Satisfaction

“Having the ability of being able to respond and the capacity of providing a service whenever the client wants it and in the place they pretend, (...)” (Hotel SM)

“(...) but whether the client sticks with us for a long time it depends a lot on the quality of service provided, how it is carried out and if the customer is satisfied.” (Tango ITM)

“(...) individualizing each client by aligning an offer according to their specific needs, considering the aspect of the traditional standard service.” (Hotel ITM)

Trust

“(...), the principal theme we want to have with the customer, is a relationship of trust, knowing that the data is safe and that we won’t use customer information for our benefit.” (Sierra SE)

Commitment

“These are proximity businesses. It is important to get to know the space, get to know the people that work there, that go there, and get to know their habits and their culture.” (Tango ITM)

“So that our contact with them doesn’t happen only in situations of stress and conflict” (Tango SE)

Communication and Problem Solving

“Yes, it is important to create an aspect of effective communication with the customer. Because there are lots of clients who like direct contact, being sure that they can receive a direct response. It is even more important for companies to ensure the customer that if they have a problem, they won’t have to wait long for it to be resolved.” (Hotel SM)

Innovation and Alignment with Customer Values

“The very speed with which we bring innovations to the market is extremely relevant.” (Sierra LSE)

“More recently we have the sustainability theme. We are a carbon-free company that has solutions for companies to manage this issue.” (Sierra SE)

Theme: Sales Process

5. Does your company follow a specific process when carrying out a sale? If so, can you describe it?

Prospecting

“Typically, a new lead starts with our BDR teams (...). And what they do, in short, is prospect the market, try to get new leads (...) but they can also come from events that we do.” (Sierra LSE)

“It is about looking around and prospecting (...), we have two main sources for lead acquisition. It is everything we know that belongs to our competitors (...) and everything that is under direct management.” (Tango SE)

Lead Qualification

“During this phase, we are qualifying, (...) thus you have to start doing a set of actions, For example, you have to create a scorecard for the lead and we should create a relationship map.” (Sierra SE)

“(...), and we qualify based on the industry the company takes part in, what the size of the firm is, what the technological needs of the company are.” (Mike SM)

Opportunity Discovery and Development

“If the lead is qualified and has the potential to turn into a client, it becomes an opportunity and the salesperson starts nurturing the relationship.” (Sierra LSE)

“Then, from there, you start talking, you can start talking with the company, (...) what are their challenges, what are their priorities.” (Mike SM)

“We determine the problem, impact and value. Then we update the relationship map. Then, when you know the discovery, you refine the vision for the client. Redefine our initial point of view.” (Sierra SE)

Proposing Solutions and Demonstrating Value

“(…) this stage will help you more with the client, trying to make a much more personalized presentation, to exactly answer their doubts.” (Mike SM)

“(…) it typically involves product demonstrations, which can be more or less customized, so that the client understands what are the advantages and value of having this product.” (Sierra LSE)

“(…) the negotiation phase, where we’re supposed to present our final proposal, (…) having all things approved from our side and guarantee that the customer buys.” (Sierra SE)

Close

“(…) from there the deal is closed, becoming a portfolio customer.” (Hotel SM)

Follow-up

“So what we do is (…) ensure that we are going along with what we have negotiated with the client throughout the Sales Process.” (Sierra LSE)

“But if you can make an up-sell or a cross-sell, (…), it will give them more opportunities.” (Mike SM)

“The Sales Process doesn’t end with the close, it ends in captivating the customer again, and returning to the beginning of the process, over and over again”. (Hotel ITM)

Theme: Selling Process and Relationship Development:

6. Do you believe the Salespeople and the sales process play a crucial role in building long-term relationships with the customer? If yes, why?

“(…) it is very important to have a process that helps us establish these relationships and then to be able to move the necessary people internally to satisfy the customer needs.” (Sierra LSE)

“The salesperson is the one who makes the first connection between the customer and the company, (…) they play a fundamental role in the development of all the previous mentioned factors.” (November SM)

“Commercials have a fundamental paper in starting to create that relationship of trust with potential clients so that they establish the contract.” (Tango ITM)

c. Has your company approach to selling evolved over time in response to changes in relationship priorities?

“We continuously keep up with the necessary evolution (…), a company that does not update itself, whether in the operational component, whether in the commercial component, if it doesn’t update itself, it loses advantage.” (Hotel SM)

“(…) In this case, the salesperson presents a more consultative approach where they seek to really create a relationship of trust and commitment with the client.” (November SM)

Theme: CRM adoption**7. What CRM system does your company use?**

- Mike & Golf – Mike’s AI CRM system
- Hotel & Charlie – Mike’s traditional CRM system
- Sierra – Sierra’s AI CRM system
- November – Sierra traditional CRM system with in-house AI integration
- Tango – Currently adopting Sierra’s AI-CRM system

d. What motivated your company to adopt it?

“To have a platform that can extract data. Because what is important here is to be able to extract data and get as much information as possible.” (Hotel SM)

“That is why the CRM concept is so important. (...) to take care of the whole customer lifecycle in an organization.” (Tango SE)

“(...) it allows us to optimize our teams and operations, increase value, in fact. (Golf SM)

Theme: CRM evolution and AI adoption in CRM systems**8. CRM systems are continuously evolving. Can you describe some recent changes in your CRM system? (e.g. social media and mobile technology integration, AI adoption)**

“Yes, there is a main point that I think we have been investing a lot, which is the fact that we are creating a single and unique view of the customer, taking in data from every source.” (Sierra LSE)

“Therefore, every project is built with AI. We predict that the action of artificial intelligence will begin to have a bigger preponderance in the development of CRM itself.” (Hotel ITM)

“At the end of last year, Sierra launched an AI-CRM platform, which is basically a platform that allows the creation of autonomous agents for the most varied use cases.” (Sierra LSE)

e. Which AI functionalities did you intended to leverage when implementing these AI-CRM systems?

“We have been working on this predictive theme for a long time. Now, what happened a year ago, was the generative theme that helps me create new content (...) and right now, the big theme is on autonomous agents.” (Sierra SE)

“Thus, autonomous agents, essentially, what they are, they are just like a human agent, taking actions on their own.” (Sierra LSE)

f. How did the company respond to the changes brought in by AI-CRM?

“Yes, honestly it was the fastest launch I have seen in the technology field. It has actually had a really good adoption, (...), also because it is so easy to use.” (Sierra LSE)

“I think clients who do not invest in artificial intelligence will fall far behind of those who do, (...) businesses that are capable of utilizing artificial intelligence (...) will stand out from those who do not.” (Delta SC)

Theme: AI-CRM impact on Sales Process**9. How has (How could) AI-CRM positively contributed (contribute) to your company's sales process? Can you provide me some examples? /What main benefits has it brought (will it bring)?****Efficiency**

"The main benefit I see, (...) is a benefit of efficiency. In other words, making the process more agile for the sales professional." (Tango ITM)

"It automates tasks such as email drafting and summarization, reunion synopsis, documents generation" (Golf SM)

"The system automatically generates leads so that the salesperson, instead of using its own empirical formula to work, receives the leads from the system itself." (Delta SC)

"That the system, (...) is able to gather the maximum relevant information regarding a specific potential customer." (Tango ITM)

"(...) the system describes a text that basically summarizes what the customer represents." (Delta SC)

"(...) there was a 30% average time reduction loss in administrative questions, 20% regarding the integration of AI in CRM." (Mike SM)

Decision Making

"the system analyzes amounts of data no human could ever analyze and gives recommendations that make people look at things they would never look at otherwise." (Sierra LSE)

"(...), artificial intelligence, what will lead us is to individualize each client, in other words, to provide a service in accordance with the specific needs of each client." (Hotel ITM)

"What we want is for the system to analyze the risk of churn and to also prepare the commercial to be better equipped for the contract negotiation process." (Tango ITM)

"You always have the next best action. The AI is constantly recommending the next action." (Sierra SE)

"(...) because the system will tell you what are the opportunities that have the highest probability of closing." (Sierra SE)

"Artificial Intelligence can also bring a bit of this, which is to understand that there are other opportunities in other markets." (Hotel ITM)

Effectiveness

"If I'm more efficient, if my communication is more efficient and personalized, if I'm more productive, (...), it allows me to deliver a more memorable experience and that translates into sales effectiveness." (Sierra LSE)

"(...) there was an increase in sales, or an average of a 20% increase in sales after adopting CRM with AI." (Mike SM)

“Then there is the coach, (...), where you can request help. We make the video, make the pitch and then he will say, you are missing this, you are missing that.” (Sierra SE)

Data Centralization and Collaboration

“And so, yes, it is obvious that the theme of collaboration also has quite the impact.” (Sierra SE)

“If CRM has a lot of information, with AI you can feed it with even more information from various interconnected systems, to engage with the client.” (Delta SC)

“The fact that this team has access to all this information, (...), it makes me able to have a much more personalized conversation with the client.” (Sierra LSE)

“AI can bring some input to help us understand, through external elements, that we aren’t performing a certain task as well as we should.” (Hotel ITM)

Follow-Ups

“Doing follow-ups could be an artificial intelligence routine. Trigger a routine email about sending a new proposal to a client.” (Hotel SM)

“Identifying new opportunities with these clients, for example, cross-selling, up-selling, and then being able to maintain that client.” (Golf SM)

Interactions and Post-Sales Support

“Helping with the support sales teams have to give to the client, identifying if this type of client needs closer accompaniment or more regular visits. Attend to questions that emerge during the contract.” (Tango ITM)

g. How do you see AI-CRM evolving in the future? Are there any improvements you would like to see?

“(…) can cross-check vast amounts of information from multiple sources, (...), to deliver hyper-personalized insights and to increase efficiency to the maximum.” (Golf SM)

“In fact, (...) every month we see new things emerging. And I am sure more things will arise, and faster every time.” (Sierra LSE)

10. Which stages of the Sales Process were most affected by AI-CRM, or which stages do you believe will be most affected by the system if adopted?

“(…) from the moment you’re working on a transaction for a client, (...), Artificial Intelligence won’t do much. But I think that in the previous process of feeding the sales pipeline, the topic of AI can be very interesting in the creation of more leads, generating more to feed the pipeline.” (Delta SC)

“(…) from predictive to generative you can use throughout the whole process.” (Sierra SE)

“It is utilized from the initial point of lead generation. And then CRM itself generates all this process of converting the opportunity, the different stages, the different teams.” (Sierra LSE)

Theme: AI-CRM impact on Relationship Development

11. By contributing to a significant improvement of the sales process, do you consider that AI-CRM also plays (will play) a crucial role in developing long-term relationships? Do you believe this system contributed (will contribute) to the development of the key factors needed for building strong relationships and achieving customer loyalty?

“Those on the other side, have an immediate perception that there is a vast knowledge of who they are, and this can create a very positive relationship.” (Delta SC)

“(…) we get to know more about our clients, their needs, and this will help us create loyalty and retain customers.” (Hotel ITM)

“If I have a message that is more personalized, I will probably be able to touch more clients, and that will allow me to establish more relationships over time.” (Sierra LSE)

“And then be able to keep the client and satisfy it and, in other words, further improve this relationship with the customer, building trust and commitment. To help acquire and retain.” (Golf SM)

Theme: AI-CRM challenges

12. Has the company faced (Do you think the company will face) any challenges when adopting this system? If so, which ones?

Human

“(…) any change that is made will have an initial phase where people resist. There’s always resistance. It’s an immutable factor.” (Tango SE)

“There is still some resistance on that side. The client says let me wait for others to do it first. It is very normal in our culture.” (Sierra LSE)

Technological

“One of the things was that sales teams had some issues in trusting the results given by AI. Then there’s the question of data privacy and the issues of AI analyzing very important customer information.” (Mike SM)

“(…) you can’t take the risk of having teams working based on wrong presupposes and incorrect information.” (Golf SM)

h. How can the company overcome such challenges?

“Adopting this philosophy is a very difficult job for every company, that artificial intelligence is not a means for replacing employees, but rather a complement that helps us being more effective and providing a better service.” (Hotel ITM)

“(…) we must have tools that control what is resulting from these systems is right, ensuring all insights produced are trustworthy, secure and robust.” (Golf SM)

“The system has to be correctly configured, well implemented, has to be stable. It needs to learn, needs to be trained to work well for our reality.” (Tango ITM)