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Universidade de Lisboa

MASTER'S IN MANAGEMENT

MASTER FINAL WORK

INTERNSHIP REPORT

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ANA ROSA CASANOVA GONÇALVES MARIANO

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ABSTRACT

This project focused on implementing a new Customer Relationship Management (CRM) tool in GALP, S.A.'s sales process. A literature review on CRM in the Utilities and Energy sector supported the development of a 'conceptual framework' for the case study analysis. The company's objectives and alignment with the UN's Sustainable Development Goals, alongside a brief overview of its key competitors, stakeholders, and offerings, are outlined.

The project purposes, methodology, and progress within the Residential Sales area of the Commercial Business Unit are discussed, with special focus on interviews with three department heads involved in CRM implementation. Findings highlight GALP's ongoing digital and cultural transformation aimed at enhancing customer service and process efficiency.

While the new CRM Dynamics system within the Centric project advances these goals, challenges persist, particularly in integrating legacy systems and achieving a 'unified customer view.' Recommendations for monitoring CRM implementation were also provided.

In conclusion, the new CRM supported GALP's shift towards a customer-centric model, addressing modern challenges in client retention, profitability, and sustainability.

Keywords: CRM; GALP SA.; U&E sector; business strategy; customer strategy; SDG
JEL CODES: M14, M39

RESUMO

Este projeto centrou-se na implementação de uma nova ferramenta de *Customer Relationship Management* (CRM) na área de vendas da GALP, S.A. A revisão de literatura sobre CRM no setor das *Utilities* e Energia fundamenta o desenvolvimento de um "quadro conceptual" para a análise do caso de estudo. São apresentados os objetivos e alinhamento da empresa com os Objetivos de Desenvolvimento Sustentável da ONU, juntamente com uma visão geral dos principais concorrentes, partes interessadas e ofertas.

O projeto aborda os propósitos, a metodologia e o progresso dentro da área de Vendas Residenciais da Unidade de Negócios Comercial, destacando as entrevistas com três responsáveis da área envolvidos na implementação do CRM. Os resultados indicam a transformação digital e cultural em curso na GALP, assim como o foco em melhorar o serviço ao cliente e a eficiência dos processos.

Embora o novo sistema de CRM *Dynamics*, no âmbito do projeto *Centric*, vá de encontro aos objetivos definidos, permanecem desafios, principalmente na integração de sistemas precedentes e na obtenção de uma "visão unificada do cliente". Também foram fornecidas recomendações para monitorizar a implementação do CRM.

Conclui-se que o novo CRM suporta a mudança estratégica da GALP para um modelo de negócio centrado no cliente, enfrentando os desafios atuais de retenção de clientes, rentabilidade e sustentabilidade.

Palavras-chave: CRM; GALP SA.; Sector U&E; Estratégia de negócio; Estratégia do consumidor, ODS.

ABBREVIATIONS

AI – Artificial Intelligence

API - Application Programming Interface

B2B / B2C – Business-to-Business / Business-to-Consumer

BU – Business Unit

BV - Besloten Vennootschap (Dutch term meaning Private Limited Company)

CRM – Customer Relationship Management

EBITDA – Profit Before Expenses

ERP - Enterprise Resource Planning

ERSE - Energy Services Regulatory Authority

ESG - Environment Social Governance

E&P - Exploration and Production

E&U – Energy & Utilities

E2E – End to End

G&P- Gas & Power

GICS - Global Industry Classification Standard

GDP - *Gases de Petróleo Liquefeito* (Liquefied Petroleum Gas)

IoT - Internet of Things

LPG - Liquid Petroleum Gas

MFW – Master Final Work

ML - Machine Learning

MSS - Managed Service and Support

NPS - Net Promoter Score

OCF - Operating Cash Flow

ODS - *Objetivos de Desenvolvimento Sustentável*

RCA - Root Cause Analysis

SaaS - Software-as-a-Service

SAP – *System Analyse Programmentwicklung*

SI – International System of Units

SDG – Sustainable Developments Goals

TI - Information Technology

T2D - Technology to Data

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1. INTRODUCTION

This report aimed to examine the application of Customer Relationship Management (CRM) in the case of GALP S.A., a leading company in the energy sector. Given the crucial role of the energy industry in developed countries[1], understanding how CRM strategies were implemented in such a context was of relevance.

The energy sector, as classified by the Global Industry Classification Standard (GICS), encompasses companies engaged in various aspects of oil or gas product exploration, production, refining, distribution, and marketing, along with those involved in electrical energy generation, transmission, and distribution. The electricity industry played a pivotal role in serving households and institutions across the developed world, supporting diverse activities in businesses, manufacturing, schools, hospitals, homes, and agriculture, where electricity is indispensable (Islam & Ryan, 2016). With its significant global impact, the energy sector holds a crucial position in the world economy, contributing to 8 to 10% of the global GDP, making it the second-largest sector after healthcare, showcasing its widespread influence and importance (Kahsar, 2023).

The sector was divided into two main categories: the demand sector, which include transportation, agriculture, residential and commercial, and industry; and the energy supply industry, which included resource extraction, energy product delivery, and conversion (Cleveland, 2004).

In recent years, the energy sector has witnessed a significant transformation, primarily due to the adoption of cutting-edge technology and customer-centric initiatives, meant to improve customer satisfaction, operational efficiency, and environmental sustainability. This transformation was deeply compromised with the SDG's goals for 2030 agenda, representing decades of a global effort of the United Nations, based on 17 critical issues, including assuring access to affordable, reliable sustainable and modern energy for all (7 goal), which, in general, aims to perspective a better future by saving the world natural resources, improving people quality of life and providing equal opportunities for all.

As a prominent player in the energy sector, GALP S.A. holds a significant position in the Portuguese Energy & Utilities (E&U) market, but also in Spain and elsewhere. The

[1] We define a developed country according to Last (2007, p.55) as: "(…) a country whose citizens have on average a sufficient income to enjoy the good things of life and usually have access to a wide range of publicly provided and private services in the health, education, social welfare, housing, transport, commercial and industrial sectors, as well as state-supported defense and security services."

internship undertaken as a Residential Sales Trainee in the Commercial Department's Stores Channel occurred within this influential context. The role involved direct exposure to the strategic deployment of a new CRM tool, aimed to enhance the understanding of customer needs, behaviours, and the growing demand for sustainable energy solutions. This tool, implemented specifically in Residential Sales at GALP S.A., was expected to be fully set up by the end of 2025. Consequently, this marked the initial phase of an action research project aimed at investigating the implications of implementing this new CRM tool within the company, which operated in the E&U industry. Thus, this research addressed the following main research questions:

Q1: How does implementing a CRM tool impact the E&U industry? Are there specific characteristics unique to this sector?

Q2: What are the main benefits and challenges of integrating a CRM tool at GALP S.A.?

Q3: How can the use of this CRM tool be optimized to enhance efficiency and customer relationship management within the Residential Sales department of GALP S.A.?

This report reflected the work developed to answer these questions and was organized into six main chapters. The first one provided a general overview, and the research queries being investigated; the 2nd Chapter reviewed the existing literature, discussing the CRM concept and its evolution, and trying to clarify how CRM can contribute to the energy sector's; the 3rd Chapter, offered a comprehensive look at the host company and the internship experience, including an introduction to the company and a description of the products and services provided; the 4th Chapter was a central one, referring to the project implementation and development, it started with the presentation of the theoretical framework developed, followed by the explanation of the methodologic approach; the presentation of data collection method and the sample, which included a qualitative method based on interviews, and finally the analysis of the results obtained; the 5th Chapter concerned the discussion of the main results, crossing the all data and information gathered, based on the conceptual framework; and the 6th Chapter, presented the final conclusions of the action research project, trying to answer to the research questions and highlighting the major contributions of this study, as well as outlining drawbacks and difficulties found, along with suggestions for further research.

2. LITERATURE REVIEW

In this literature review, the selection of studies considered their relevance to the application and implementation of CRM within the energy sector and sales areas. It has begun with a general overview of the CRM concept, discussing its evolution and associated strategic models. This was followed by an examination of research focused on CRM in the energy sector. This approach ensured coherence between the internship conducted at GALP SA, where a new tool and CRM strategy were being implemented, and the existing academic research. The aimed was to provide insights into how theoretical concepts could and should be applied in real-world scenarios, particularly in the energy sector.

2.1 The Impact of Technological Advancements on CRM

Technological development and the internet growth change the business world: its raised market competitiveness, creating new challenges to companies. With the exponential growth of competition, marketers focused on customer retention and loyalty, recognizing the long-term benefits of retaining existing customers over acquiring new ones (Cannie & Caplin, 1991). In that context, the concept of Customer Relationship Management (CRM) emerged and become a recognized an important business tool for costumers' management. In fact, CRM was recognized as a tool, which has associated social and economic values (Adams et al., 2021), becoming the lifeblood of industries and businesses. Several authors provide deep insights into the evolution, implementation, and strategic impact of CRM on organizations and, referred to the term CRM as one of the most important concepts in modern marketing (Armstrong and Kotler, 2016; Kumar and Reinartz 2012).

Briefly, CRM can be defined as a process of managing customer information to build and maintain profitable relationships with consumers (Armstrong and Kotler, 2016). However, this definition was quite narrow, as CRM encompasses much more than just customer information management. It involved a holistic approach to understanding customer needs, improving customer experience, fostering loyalty, and driving long-term value through personalized marketing, sales, and service strategies. CRM was also about

leveraging data analytics, automation, and technology to enhance customer interactions and optimize business operations across multiple touchpoints.

2.1.1. Evolution of Customer Relationship Management: From Industrial to Information-Era Approaches

The concept of Customer Relationship Management appears in the second half of the 20th century. In the industrial era, the priority was mass production and the volume of sales, over fostering individual customer relationships, as noted by Sheth and Parvatiyar (1995), who traces the development of customer relationships back to the pre-industrial era, when direct marketing practices were in place. The authors emphasized that technological advancements gradually allowed a direct interaction between producers and users, promoting a paradigm shift from transactions and a focus on exchanges in the industrial era to a focus on relationships in the post-industrial era, somewhat in line with the pre-industrial era.

The earliest concepts of CRM can also be traced back to various authors, such as Levitt (1983), Gummesson (1987), and Grönroos (1990), who all agreed that CRM served as a tool for effectively managing customer interactions. The two last had a more extensive perspective, establishing that customer relationships should take center stage (Parvatiyar and Sheth, 2001a). In the turn of the century, CRM was also defined as a tool that improved the marketing productivity and involved the integration of the customer service, sales department, and supply-chain (Parvatiyar and Sheth, 2001a). The authors drew attention to the fact that 'relationship marketing' and CRM have often an identical use in some literature (Parvatiyar and Sheth 2001b). Indeed, the first term, introduced by Berry (1983) drives to CRM, which join to it information technology (Ryals and Payne, 2001). CRM can be seen as "information-enabled relationship marketing" (Ryals and Payne, 2001, p.3), which may be applied differently across various industries and within certain vertical markets. In short, CRM's concept may drive from 'relationship marketing' ideas but was intrinsically connected to information technology developments and the internet growth, having a vast and diverse application within the enterprises' strategy. In fact, the term as multidisciplinary nature been used across multiple fields (Buttle, 2004; Winer, 2001) and it was developed across different journals and disciplines, such as Marketing, Business, Management, and IT and SI (Ngai, 2005; Rababah et al.,

2010). All these range of works emphasize the importance of CRM for the companies' strategy in several departments and not exclusively as a marketing tool (Ngai, 2005). Also, it was attested that IT and SI disciplines played an important role and have a great impact in the development and implementation of CRM tools (Ngai, 2005). Furthermore, given the prominence of the area of data analysis for the operation of CRM tools, other authors trace the origins of CRM back to database marketing in the 1980s (Buttle and Maklan 2019).

Nevertheless, the lack of a universally accepted and consistent CRM's definition (Ling & Yen, 2001; Ngai, 2005; Ngai et al, 2009), as well as a certain confusion about CRM's components (Payne and Frow, 2005), and even the need for its full understanding and its completeness (Rababah, 2011), contributed to the failure of a CRM project within an organisation. According to Payne and Frow (2005) this was not a question of semantic but rather a question of success or failure of a project since its concept affects the way the entire organization leads with it and implements it. Considering the variety of CRM definitions and its imperative relation with technology, Payne and Frow (2005, 2013) identified three main approaches or perspectives, concerning the way CRM was accepted and used by an organization (Appendix, Annex A – Figure 1):

- narrowly and tactically as a specific technology solution project (e.g., it solutions);
- wide-ranging technology, integrating series of customer-oriented and technology solution;
- broadly and strategically, as a customer centric holistic approach, allowing selective management of customer relationships to create shareholder value.

Payne and Frow, such as other authors referenced in this work, highlighted the importance of the transition of CRM into a strategic framework that emphasizes customer value and relationship continuity. Consequently, Payne and Frow proposed a strategic model that will be further analysed, which has been considered as somewhat the best practice and template to be adopted by businesses seeking to implement or enhance their CRM strategy (Boulding, Staelin, Ehret, & Johnston, 2005).

CRM plays a crucial role in modern business strategies, helping companies to manage customer interactions and data across various touchpoints. To achieve full operability, CRM has evolved into multiple types, each designed to serve specific organizational needs and goals. While initially focused on operational and strategic aspects, CRM has expanded to include analytical and collaborative dimensions, driven by technological advancements and the rise of big data. Understanding the distinct roles of these CRM types was essential for businesses looking to optimized customer relationships, enhanced decision-making processes, and maintained competitive advantage. Considering the full operability of CRM, three principal types have been identified:

- the strategic CRM - a customer-centric business strategy that aims to win and keep profitable customers, which can lead to long-term shareholder value (Nieg 2009; Buttle and Maklan, 2019);
- the operational CRM - focused on automating customer-facing processes such as sales, marketing, and customer service (Nieg 2009; Buttle and Maklan, 2019);
- the analytical CRM - the process through which enterprises examen and study the customer-related data (into actionable insights) for strategic or tactical purposes; this way the organization can allocate resources strategically, for example towards the most profitable group of clients (Buttle and Maklan, 2019).

Later, a fourth type was also identified by other researchers:

- the collaborative CRM – the communication process between different departments, teams, staff members etc. in the organization, improving teamwork and facilitating efficient interaction with clients across different communication channels (Farquad et al, 2014).

This last dimension was quite important because if channels' coordination was poor, it could compromise the adequate implementation of CRM in the organization. Historically speaking, operational and strategic CRM has been preferred, but ‘big data’ emergence, around 2010, brings analytical CRM to the forefront, due to its attractiveness to business, allowing the analysis of large and sophisticated data sets (Pellegrini, 2021). This raises the need for the application of data mining tools in CRM, which was an emerging trend in economy (Ngai et al, 2009). It allows efficient analysis of customer behaviors and their characteristics from large databases. Based on data mining techniques, a new visual tool was proposed, which identifies homogeneous target groups

in terms of customer needs, customer characteristics, and customer value: the customer map (Woo et al, 2005). To achieve that, customer data sources were integrated, and customer information classified into these three main parameters. This targeting model had several advantages, including to target and keep the right customers and to avoid preconception due to its visualization ability, allowing a quick observation of customer distribution and its current state (Woo et al, 2005).

Additionally, the impact of social media and cloud computing on the evolution of CRM, transforming it into a more accessible and customer-driven tool, was a subject that was gaining prominence (Greenberg, 2010). In fact, in the last decades and after the pandemic, the 'net generation' technological savviness, apart social media marketing and brand management, brought forward areas of information technology management and customer relationship management, to which firms must pay attention (Santiago & Pimenta, 2021).

2.2. Strategic CRM Models and Processes: a Framework for Customer-Centric Business Success

To understand the key factors behind successful CRM implementation, it is important to examine the theoretical models of strategic CRM. Current evidence suggests that the evolution of CRM is closely linked not only to technological advancements but also to significant shifts in business strategies.

The first model was proposed by Ryals and Payne (2001) based on four principal elements: developing a relationship marketing philosophy, adopting an appropriate organizational structure, taking advantage of the data warehouse, and making use of the data infrastructure for CRM and tactical customer management (Ryals & Payne, 2001). Emphasis on strategy was rather shy in this proposal so, few years later, another proposal called by the authors the 'process-oriented conceptual framework', emerged (Payne and Frow (2005, p.3) This view of CRM requires a cross-functional integration of processes, and their identification. So, the authors start by identifying five generic key cross functional processes, which take part in CRM development and implementation:

i. Strategy development process –The process involved two dimensions: the business strategy that should be first considered and the costumer strategy.

The success of CRM implementation depended on good connection between these two dimensions.

ii. Value creation process – This second key process also implied two directions: the value received by the organization from its customers; and the value delivered from the organization to its customer. Successful management of these two value dimensions, which involved co-creation or co-production, could result in increased lifetime value of desirable customer segments.

iii. Multichannel integration process - As argued by authors and already mentioned above, third key process was one of the more relevant for CRM success. It joined outputs from key one and two (strategy development and value creation) and converted it in "value-adding activities with costumers" (Payne and Frow, 2005, p.172), resulting in great impact on the way clients perceive and adhere to the organization.

iv. Information management process - Fourth key process was core element since it concerns the collecting of data, resulting in the data repository of customers, and implies complex IT systems, analytical tools, back and front office applications tools, plus great investments in its planning and management. It allowed sharing of customer information throughout the whole organization, as well as the business activities measurement.

v. Performance assessment process – The fifth key process concerned accountability and the measurement of results, the accomplishment of the objectives defined by the strategy, and guaranteed the implementation of improvements when necessary. According to the authors, the key process four was an important starting point for key process five: the performance assessment (Payne and Frow, 2005).

The primary focus of this business approach lies in cultivating a one-to-one relationship strategy, rather than fostering a relationship with all customers (Schneider et al., 1995; Payne and Frow, 2005; 2013). This approach was possible with the CRM system's ability to store each pertinent customer interaction and recall all previous engagements with that customer during future interactions (Pellegrini, 2021).

The organization's strategy towards costumers' behaviors and performance, was also deeply analyzed by Ngai (2009). Following previous research, he presents a "closed cycle of a customer management system" (Ngai, 2009, p.2593-594), based on the four dimensions of CRM, classified by several authors (Swif, 2001; Parvatiyar and Sheth, 2001a; Kracklauer et al, 2004):

- Customer Identification – It involved targeting the population most likely to become customers or most profitable for the company.
- Customer Attraction – It involved direct effort and resources to attract target customer segments, such as direct marketing, which is a promotion process that motivates customers to place orders through multiple channels.
- Customer Retention – A core concern for customer retention, it included one-to-one marketing, loyalty programs, and complaints management.
- Customer Development – it included customer lifetime value analysis, up-cross and selling, and market basket analysis for individual customer profitability.

The main objective of these classifications was to promote a deeper understanding of customer profiles to maximize customer value for the organization in the long term. Therefore, the company's strategy should be pictured in long-term, aiming the customer identification, attraction, retention, and development (Ngai et al., 2009). All these approaches perceive customers as the organization's asset (Doligalski, 2015).

2.3. The Role of CRM in the Energy Sector

A few research works highlight the pivotal role of CRM strategies in the energy sector (Vilas, 2015; Pellegrini, 2021)[2]. Increased competitiveness in business makes it essential for an organization to create and maintain lasting relationships with customers. In Portugal, with the liberalization of the energy market, within the Utilities, organizations that previously held a monopoly in the sector, found themselves obliged to change their strategy and focus on the customer (Vilas, 2015). The Energy & Utilities (E&U) industry was dealing with two main challenges that were creating new regulations: the energy transaction and the digital transformation. Thus, E&U organizations were carrying a lot

[2] In addition to these two theses, no relevant scientific articles were found on the topic but the last one, being a doctoral thesis discussed and approved by a recognised Jury, was considered a quite valid reference for the development of this work, as attested further.

of social responsibility by being advised to respond, positively, to environmental challenges through the energy transition to a net-zero emissions future. Their success implies the adoption of a core business model that was decarbonized, digitalized and that puts people at the centre of the strategy, advising a sustainable way of living and running new business operations with the support of large CRM systems (Pellegrini, 2021). In fact, the E&U industry shows a high level of maturity concerning technology. E&U companies, while investing in alternative energy sources, have changed for smarter digital technologies, as well as analytics and Internet of Things and they expanded their revenue by trying to optimize costs through automation (WNS, 2017). In a highly competitive context, there was a requirement for this industry to provide improved customer experience and to optimize operational costs. Thus, business activities require agility and flexibility to keep up with the conditions of the legal framework, to increase general requirements, technological novelty, and changes in customer needs. Looking to some trends store for this industry it concerns (WNS 2017): (i) 'Personalized Interactions with Customers will Multiply' – due to the expected competitive raising, E&U companies will strive to design best omni-channel customer experiences, trying to better understand consumers' needs and responding with integrated solutions and flexible choices; (ii) 'Digitalization will Rewire Operations - E&U companies will increasingly use social media, digital marketing, mobile solutions, big data analytics, IoT and cloud services connecting easily with consumers and also making the IT costs to slash; (iii) 'Digitized Field Operations' - smartphones and tablets will offer real-time data to field teams and the automation and analysis will ensure an 'always on' and synchronized field operations with back-office data, therefore, consumers will be also empowered with accurate real-time details of power usage enabling an efficient consumption. In short, in a way it could be said that E&U companies can move from supplying energy to enabling lifestyles (Pellegrini, 2021).

Pellegrini (2021) identified the key features of CRM in the energy industry through case studies of British Gas, GEN-I Group, and Eni Gas. The study highlights that both operational and strategic CRM were essential for ensuring high-quality operations and seamless customer interactions across various channels. While operational excellence remains a core strategy for the industry, investments in CRM software have enabled deeper customer relationships, emphasizing "customer intimacy value". Despite high

levels of customer individualization, CRM strategies mainly focus on product management to improve sales, and only to a limited extent to improve customer relationships, which were divided merely between B2B and B2C segments (although there is still micro costumer segmentation, supporting marketing operations). For this reason, CRM strategy falls into 'Managed Service & Support category'. Barriers to CRM success include a lack of skills to manage evolving IT systems, that need continuous revision due to the severe market and legal regulations. In short, the greatest challenge of this industry drives into three directions: "people, purpose-driven profit, and planet" (Pellegrini, 2021, p. 77; Stark et al, 2020). Later in this project report (sub-section 5.1.2) main results based on these case studies, will also be compared to the analyses for the case of GALP S.A.

3. COMPANY AND INTERNSHIP OVERVIEW

The presentation of GALP, S.A. and the internship were fundamental to better understand this master final work (MFW) purpose and goals. Therefore, chapter four was a general characterization of the company and the scope of the internship.

GALP, S.A. is a multi-energy operator, present in all stages of the oil, natural gas and electricity value chain. It is a large Portuguese company with long experience in the energy sector, with a strong presence in the natural gas and oil Iberia's market. Currently, GALP, S.A. is strongly dedicated to renewable energies, embracing actual challenges of the E&U industry and showing a compromise with sustainable behaviors and goals. Furthermore, as already mentioned, the company was investing in the implementation of a new CRM tool to be fully implemented at the end of 2025, at the Residential Sales area in the Commercial Department's Stores Channel where the internship as a Trainee took place.

3.1 The Company: Origin and Organic Structure

The GALP, S.A. embryo was 'Galp energy', created in 1999, which resulted from the fusion of national state-owned companies: Petrogal, Gás de Portugal and Transgás. In 1976, the government nationalized several companies (SACOR, Sonap, Cidla, and Petrosul), forcing them to merge into the newly founded biggest Portuguese company: Petrogal. In 1978, the trade name GALP was first adopted by Petogral (Pfeiffer, 2021).

Around 2010, Portugal's market liberalization brought significant changes. By 2013, GALP Energy was recognized as the only Iberian operator to produce and market all forms of energy, catering to consumer needs for mobility, comfort, and efficiency. It was also the first Portuguese company to be ranked among the 100 most sustainable companies globally, according to Corporate Knights (Sousa, 2016). In 2016, GALP rebranded as a 'global energy group,' evolving from several gas and energy companies into a multinational operator involved in everything from crude oil and natural gas exploration to energy services for consumers (Pfeiffer, 2021).

Currently, the GALP Group is constituted by GALP and subsidiaries, which include:

- GALP Energia E&P BV and its subsidiaries, which carry out their activities in the exploration and production of oil, gas and biofuels (Upstream);
- Petrogal, S. A. and its subsidiaries, which carry out their main activities in areas such as: (i) marketing of oil and derivatives, natural gas, electricity and electric mobility, (ii) crude oil refining, (iii) biofuels, (iv) supply chains value of batteries and (v) hydrogen;
- GALP New Energies, S.A. and its subsidiaries that develop activities in the renewable energy sector and new businesses;
- GALP Energia, S.A., a company that integrates corporate services.

The Galp Group's organizational structure consists of five main business units: Upstream, Industrial, Energy Management, Commercial, and Renewables & New Business. In addition, there was a corporate center that offered various services to these units and companies, including IT, planning and control, accounting, legal advice, governance, and human resources. The corporate governance framework at GALP features a management structure that includes the Board of Directors and an Executive Committee, which was delegated day-to-day management responsibilities by the Board. The governance also included a robust supervisory structure, comprising the Audit Board and the Statutory Auditor, along with a Company Secretary who provided specialized support to the governing bodies [3].

The results of the Group companies were consolidated in the results of GALP Energia, SGPS, S. A. document report (GALP – IMR, 2023). In 2023, GALP's RCA EBITDA was €3,558 m, while Operating Cash Flow (OCF) was €2,269 m, reflecting a robust

[3] See: https://www.galp.com/corp/en/about-us/galp/organic-structure (retrieved on 15-07-2024)

operating performance across all business units. In December 31 of 2023, GALP had 7,054 employees, spread across 10 countries from 52 nationalities.[4] At present, digital transformation was a main concern of the company for value creation, to increase efficiency and to face market competitiveness. Therefore, a Technology to Data (T2D) transformation, based on a well-coordinated organization and a restructured team, was in place (GALP – T2D, 2023). The recent reorganization of Commercial Business Unit (BU) and the implementation of the projects, such as the Centric Project, including the Dynamics CRM set up at the Residential Sales area, to be completed in 2025, and the BillUp project, which included Billing from SAP ERP solution, as well as other digital tools such as the 'Mundo Galp' app to facilitate clients experience and the 'Daloop' that offered a software-as-a-service (SaaS) solution for managing electric vehicle, were all new faces of this 'digital transformation'. It revealed in a costumer centric approach, which was fundamental to identify and target the customer segments, to partner with them, and to build a customer mindset in the organization (Cole et al, 2022).

3.1.1 Vision, Mission, and Values

Long-term sustainable values and decarbonisation were main goals of the strategy of GALP S.A.,[5] in accordance with SDG's 2030 and aligned with the objectives of the Paris Agreement, as part of the collective effort towards net zero emissions economy by 2050. According to GALP's website, environmental protection was central to all stages of its activities, from design to the end of product life. GALP aimed to create long-term value by addressing global concerns about climate change through a strategy that balances financial strength from traditional sectors with innovation in lower-carbon alternatives like clean hydrogen and biofuels. [6] However, these alternatives were not competitive as fossil fuels, requiring enhanced engineering and project management skills (Cole et al, 2022). GALP's new CRM strategy aligns with its environmental goals and the UN's Sustainable Development Goals, emphasizing a customer-centric approach. Also, recognizing its responsibility in the energy transition, GALP designed a comprehensive

[4] See: https://www.galp.com/corp/en/investors/publications-and-announcements/investor-announcements/investor-announcement/id/1516/galp-4q-fy23-results-and-outlook (retrieved on 30-07-24).
[5] See: https://www.galp.com/corp/en/about-us/galp/strategy (retrieved on 01-08-24)
[6] See: https://www.galp.com/corp/en/sustainability (retrieved on 01-08-24)

plan that addresses Environmental, Social, and Governance (ESG) dimensions, producing positive impacts across the company. GALP has been collaborating with people from every business unit to define its key sustainability goals for 2030 and to develop a joint action plan for 2023-2025, involving both the corporate centre and all business units.[7]

Galp emphasized innovation through collaboration with governments, research institutions, startups, universities, and other stakeholders to foster knowledge exchange. This approach aimed to advance the adoption of renewable technologies. The company focused on creating sustainable value for stakeholders and shareholders by promoting social dialogue and forming new partnerships. For example, in 2023, Galp, in partnership with Bosch and TJA – Transportes J. Amaral, introduced a 100% renewable fuel for corporate customers and logistics operators (Silva, 2023).

Committed to three main principles - sustainability, energy security, and affordable prices - GALP aims to play a pivotal role in local sustainable development. The organization strives to directly impact environmental conditions and the quality of life in the communities where it operates. GALP's social engagement was evident in initiatives like the 'Energy: Building the Future' partnership with *Observador*, which educates the public about the energy sector through podcasts, tutorials, tips, and quizzes. [8] Additionally, GALP's "Startup the Future" calls, part of its Global Open Innovation Program, [9] promote research and reshape the energy landscape, focusing on affordable global energy access and community well-being.

3.1.2 Business Sector: Main Competitors and Products & Services

Energy companies are part of the Utilities sector, providing essential services for daily life, making them integral to public infrastructure and subject to heavy regulation. These companies face high costs for infrastructure updates and maintenance. In Europe, including Portugal, the energy sector was undergoing significant changes, requiring both technological and sustainable innovations. Portugal's energy market was particularly notable due to its high business volume and large customer base (Osório, 2021). While these companies typically generate stable incomes, they have begun shifting their

[7] See: https://www.galp.com/corp/en/sustainability/our-foundations (retrieved on 27-07-2024)
[8] See: ObservadorLab:https://observador.pt/seccao/observador-lab/construir-o-amanha-energia/ (retrieved on 01-08-24)
[9] See: https://startupthefuture.galp.com/ (retrieved on 31-07-2024)

strategies toward end consumers, especially in the Residential sales area, as observed in GALP S.A. during the internship.

According to ERSE's 2024 Bulletins, Portugal's retail electricity and natural gas markets, across four segments (domestic, small business, industrial, and large consumers), have 32 active companies. In May 2024, the electricity market had 5.6 million customers and an annual consumption of 42,213 GWh, reflecting a 2.3% increase in customers and a 0.6% drop in consumption compared to May 2023 (ERSE- electricity, 2024). The liberalized market is dominated by four large suppliers: EDP Commercial, Endesa, Iberdrola, and GALP S.A. While EDP, formerly a state monopoly, remains a strong competitor, GALP has aligned its strategy with customer priorities like price and service quality, leading to higher client satisfaction (Osório, 2021).

In May 2024, the liberalized natural gas market in Portugal had 1.1 million customers and an annual consumption of 29,180 GWh, reflecting a 0.6% decrease in customers and a 6.7% reduction in consumption compared to May 2023. Although EDP leads in client numbers for domestic and small business segments, GALP has higher consumption levels in the industrial and large consumer segments (ERSE- natural gas, 2024), likely due to its mark and established reputation in the oil and gas market.

In the crude oil sector, GALP's main competitor is BP Portugal. Despite GALP's advantage of a former state monopoly, it faces significant competition. Both companies have strong partnerships: GALP collaborates with Sonay, while BP partners with Jerónimo Martins Group, offering competitive discounts and card premiums. However, GALP, with its focus on retail, energy solutions, and mobility, maintains a strong market position in Portugal and internationally, supported by a robust commercial strategy.

The company's commercial business offered a comprehensive range of traditional products and services, but also multi-energy solutions. This included convenience services like daily products at stations, decentralized solar energy, and electric vehicle charging. [10] Plans in partnerships such as 'GALP & Continent' and 'Home 360 GALP' provide discounts on home services and additional needs; and plans including different products like 'Road & Home' and 'Electrical Mobility & Solar' were tailored to customer profiles. [11] These initiatives, supported by investments in CRM and digital transformation,

[10] See: https://www.galp.com/corp/en/about-us/what-we-do/commercial (retrieved on 31-07-2024)
[11] See: https://casa.galp.pt/planos-eletricidade-e-gas (retrieved on 31-07-2024)

enhance client profiling and responsiveness, contributing to the company's strong performance.

3.1.3 Commercial BU and Residential Sales

The main goal of the Commercial BU was to be the preferred partner for businesses, individuals, and communities in Iberia and selected international regions, helping them decarbonize their supply chains and consumption profiles. This included addressing their energy needs for production, daily activities, and comfort at business sites, homes, and during mobility (GALP - IDoc., 2024). GALP was adapting to new consumption patterns by offering more sustainable and digital products and services, and the Commercial BU aims to adjust to diverse client profiles and needs. Its operational structure of the company included the following areas: (i) Mobility: provided energy solutions such as petroleum products, electric mobility, and new energies, supported by a robust network of service stations; (ii) Company Business: delivers energy solutions to B2B customers, including petroleum products, natural gas, and electricity, along with diversified multi-energy options to aid in the transition to low-carbon energies; (iii) International: manages operations in Portuguese-speaking African countries, selling petroleum products and LPG through a network of service stations, dealers, and resellers; (iv) Residential: offers natural gas, electricity, energy efficiency solutions, LPG in cylinders and bulk, and increasingly, solar energy and electric mobility. In this sector, GALP supplies natural gas and electricity to over 355,000 customers in the Iberian Peninsula, positioning itself as a major market player.[12]

Residential purpose was to enhance Galp multichannel and multiproduct to deliver home solutions to Residential customers (GALP I Doc., 2024). Through its Residential area, the company provided services for safety, efficiency, and comfort, and supported the adoption of new energy solutions. Notable examples include: (i) GALP Solar (a decentralized renewable energy solution using small-scale solar systems and advanced technologies to optimize installation costs and efficiency); Electric Mobility (GALP's charging network surpassed 4,800 points in the Iberian Peninsula, reinforcing its leadership in this sector); The smart bottle ‘Pluma’ within LPG Business (launched in 2022, allows real-time gas level monitoring through the Mundo Galp app and sales

[12] See: https://www.galp.com/corp/pt/sobre-nos/o-que-fazemos/comercial (retrieved on 25-07-2024)

continues to grow) [13]. The company also plans to introduce new products like batteries, electric vehicle chargers, and domestic solutions to tap into the high market potential in the Iberian Peninsula (GALP – IMR, 2023).

3.2 Internship Scope

The internship involved a variety of activities within the Residential Sales area of the Commercial Business Unit, addressing the organization's daily needs and requests. A key aspect of the experience was immersing in the company's environment, embracing its values, and gaining a clear understanding of its goals, functions, and organizational structure. Additionally, it was essential to analyze GALP, S.A.'s client management strategies, particularly around CRM, to fully grasp the complexity of the organization. This thorough understanding enabled the identification of potential improvements or adjustments, informed by the action research conducted during the internship.

The right choice and a well implemented CRM system was the key for the organization success; it improved the quality of customer services, decreases labor costs and allows better financial performance, helping the organizations to coupe efficiently with competitors. So, the research work comprehends an overview of the several CRM and databases in place, and the study of the new CRM where all information it will, eventually, migrate: the Microsoft Dynamics 365, recently in place, and expected to be fully implemented in 2025. Therefore, participation in a training course about this CRM tool, which was being implemented in the Residential sector at GALP, provided a broader view of the system and the Company needs. Also, understanding the implementation and steps of the 'Centric project', that corresponds to Dynamics CRM set up at GALP, was crucial. A particular effort was made to understand Residential area, namely the channel structures that sell and deliver power products, as well as current Residential customers' main profiles and its implications for Company business development. Following the process of defining the E2E value proposition for customers in the Residential area, together with product areas, was also attempted whenever possible.

This experience within the company, along with a review of existing literature, underscores the pivotal role of CRM systems in not only optimizing sales and customer service processes but also supporting the transition toward new clean energy solutions.

[13] See: https://casa.galp.pt/pluma-garrafa-de-gas-inteligente (retrieved on 31-07-2024)

4. PROJECT DEVELOPMENT

The project development was led by the so called 'interaction research', as defined by Gummesson (2002), merging what was learn from the academic background and from the literature review with the experience gained in the field, which involved tasks developed during the internship at the GALP, S.A. and its staff generous sharing of knowledge, in particular managers inputs during interviews planned and implemented by the author of this action research project. In fact, academic knowledge and practical know-how integration facilitate results. So, during the study development, an effort to join theory and praxis was made, so that main research questions could be answered and practical results for GALP S.A. achieved, to contribute for its objectives and expectations. This way it was expected to contribute to the organization's mission, by broaden knowledge about the new CRM tool implementation process and helping GALP, S.A. to solve constrains that may raise, and to take, hopefully, better informed decisions for future.

4.1 Conceptual Framework

Drawing primarily on the literature review and a solid understanding of key CRM concepts (Annex B – Table I), along with insights related to the complexities and specific needs of the Energy & Utilities (E&U) sector, a conceptual framework was developed to facilitate a comprehensive analysis of CRM, applied to GALP, S.A. This framework was designed in two steps: first, constructing a CRM model to analyse the core ideas, strategies, and organizational aspects of GALP's system; and second, creating a table outlining the main features of CRM commonly utilized in the E&U industry to assess GALP's position within this broader context.

Findings from the CRM literature propose that there is an alignment between the organization's processes for managing customer data, developing relationships, increasing sales, and streamlining various tasks (Damsten, 2023; FlairsTech, 2023; ADA Asia, 2023). Therefore, it was crucial to compare GALP S.A.'s CRM system to these models to effectively address the research questions.

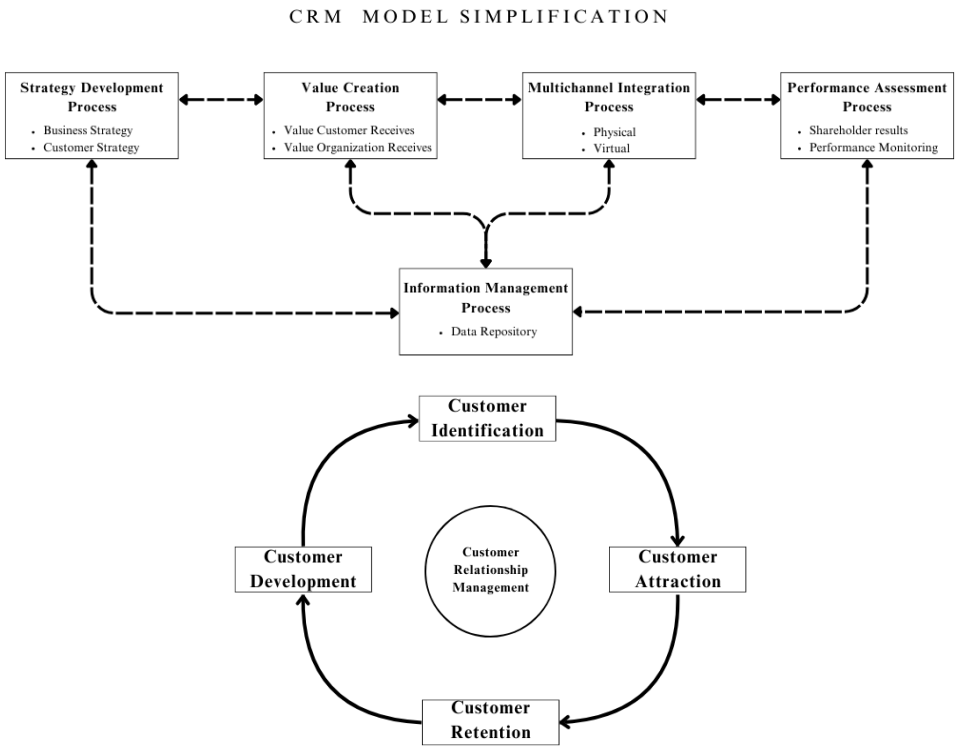

Figure 1. CRM model simplification. Own elaboration.

Considering the principal features of CRM developed and implemented by the energy industry (Pellegrini, 2021), as explained in sub-chapter 2.3 and summarized in Table II of Appendix - Annex B (Technology option; Type of CRM; Business strategy; Customer strategy; CRM strategy; Barriers to CRM success; Main challenge), it was essential to compare them with the CRM features of the company. This comparison helped to answer a fundamental research question: *How does implementing a CRM tool impact the E&U industry? Are there specific characteristics unique to this sector?* It also facilitated understanding GALP's position relative to its global counterparts.

4.2 Methodological Approach

This sub-chapter outlines the methodology used for this Master's Final Work, representing the initial stages of an action research study on CRM implementation at GALP, S.A., in the Energy and Utilities sector. As mentioned in the introduction, this study combines a comprehensive literature review with a qualitative analysis of GALP's project development, which was expected to be fully implemented by the end of 2025. The literature review, presented in Chapter 2, explores CRM both generally and within

the energy sector, helping the author understand the complexity and scope of CRM approaches. It consisted in secondary sources, mainly collected by direct research on Google Scholar, Scopus and other peer-reviewed scientific databases, plus the supervisor's recommendations, and comprehends scientific articles, a few books but also some theses about the subject and some reports of the web content, which required a thoughtful selection. The characterization of the internship environment, which involved presenting the Company and the internship goals, already done in Chapter 3, allowed the author to understand the complexity of the case-study. This was done based on an analysis of the Company's reports, internal documents, and GALP's webpage exploration, as well as the observation and gathering of the proceedings at Commercial BU, the participation in several management meetings, plus the informal inquiring of the staff during internship. Chapter 4 is about the 'Project development' and it begins with the design of the theoretical framework within the field of study. This was primarily based on a literature review and was divided into two steps: conception of a conceptual framework model (Figure 1, section 4.1) and a comparative main parameters' table (Appendix, Annex B – Table II), that can work as guidelines for the subsequent development of this action research, about CRM implementation at GALP, S.A. It results from a deep analysis of principal concepts and models of CRM and studies of CRM application on the E&U Industry. It will allow to analyse the case-study position and achievements in terms of CRM strategy, as well as compare it with a larger sample of E&U industry.

Another important step in the Project development Chapter, concerns the qualitative study and the gathering of primary sources. This was accomplished in two ways: (i) through observation and experience gained during a six-month internship at GALP, which included daily observation and study of company workflows, analysis of procedures and their prioritization, participation in various meetings, and attendance of a course about the new CRM implementation; and (ii) by designing and conducting interviews to three managers,[14] with selection based on their job positions and their involvement in the CRM implementation process, which allowed for a deeper characterization of GALP's CRM process developments. Particular attention was dedicated to the data collection method and sample selection for these interviews, as well as to the analysis and main results

[14] Interviewee I, Head manager of Residential Sales area / Iberia; Interviewee II Head manager of Customer Success and HSEQ; Interviewee III Channel Strategy &Optimization Manager within Residential Sales area.

achieved. This step was fundamental to better understand the company's business strategies and the team's strengths and weaknesses regarding the CRM implementation process. Semi-structured interviews were conducted, and the data was gathered and analysed using MaxQDA software to facilitate data comparison. Apart from the study and observation of the company's operations by the author of this MFW, the outcomes obtained from the interviews were essential to support the findings and providing a comprehensive understanding of the CRM process at GALP, S.A. Therefore, the analysis of the results, which involved integrating all the gathered information, will constitute an important section of Chapter 4. This analysis aims to clarify the goals and justify the work conducted during the action research project.

The main findings discussion is the next step in Chapter 5. This involved organizing the results and comparing them with the model and the table of parameters proposed in Sub-chapter 4.1, ultimately resulting in general recommendations for the enterprise. Finally, reflecting about the principal results will allow to reach the main conclusions and answer the primary research questions in Chapter 6. In this final chapter, possibilities for further research and any limitations of the study will also be discussed.

4.3 Data Collection Method and Sample

As mentioned, a qualitative methodology was employed for this study and the data collection method chosen was the interview. The target audience were managers from the Company involved in the new CRM (Dynamics 365) implementation, within 'Centric project'. The interviewees were chosen according to their role in the company and administrative responsibility regarding the development and implementation of the CRM system. Emphasis was given to the managers of Residential area, where the new CRM was in process of implementation till the end of 2025. The first interview, was made to the Head Manager of the Residential area, integrated in the Commercial BU. It comprehended 18 open-ended questions, and later two questions with the same content were added, only to clarify less precise answers. The manager of the 'Channel Strategy & Optimization' sector, within Residential area, was also interviewed detailing channels' aspects of GALP's strategy. This interview comprehended 10 open-ended questions, following, in general, a similar sequencing but, again, later four questions with the same content were added, only to clarify less precise answers. Another important area to

include was the Customer Analysis. So, the Head Manager of 'Customer Success' was also interviewed. Once more, 10 open-ended questions were made, following, in general, the same order (Annex B – Table IV). The interviews took place during February 2024, and additional questions were added in June. First interviews were done face-to-face, in a one-to-one basis, facilitating conversation and the acquisition of as much information as possible in a friendly and comfortable environment, that encouraged interviewees to share information (DiCicco-Bloom & Crabtree, 2006). Further questions were sent to the two Head Managers only via email, since it was not possible to schedule a suitable meeting. All the interviews were audio-recorded, with the permission of the interviewees, for a precise and accurate data collection and to allow further verbatim transcription and revision by the interviewees.

Non-standardized, semi-structured interviews (Saunders et al., 2012) were made to the three managers (Annex B – Table III for sample characterization and Table IV for questions identification), allowing the interviewer to adjust the questions to the different interviewees and change the order of questions or ask new questions that emerged during the conversation, as it can sometimes bring important and more updated information. Nevertheless, the list of questions/aims previously established (Saunders et al., 2012) was followed, with its sequence corresponding to the five generic key functional processes of the conceptual framework model, and crossing main parameters/features considered in the literature for implementation of CRM in the case of E&U. Therefore, content analysis of the data collected was done resorting to MaxQDA tool and the method used is a close one, since categories / subcategories created derive precisely from the literature review (Bardin,1977). This way, the process of tag segments for data organization and its categorization was facilitated.

4.4 Analysis of Results

The findings from the interviews reveal that GALP was improving the practices in the Energy & Utilities sector regarding CRM, adopting an integrated and strategic approach to improve customer experience and operational efficiency. The transition to CRM Dynamics 365 represents a significant step in the 'digital transformation' of the company (mentioned on Chapter 3) and the centralization of customer data. Interviewees

highlighted that this move was crucial for enabling a more unified and consistent customer view, which was essential for success in a liberalized market.

According to Interview II, between 2019 and 2020, all the commercial areas at GALP S.A. were integrated, and in 2023, the Residential Sales area was established. This development is reflected in the diagram of the Commercial BU and the Residential area (Annex A – Figure 2), based on interview I, which can be considered the most significant one regarding the CRM implementation process and company's strategy. In the Residential area, the 'Channel Strategy and Optimization' played a crucial role in enhancing the entire Commercial Unit. This was where the 'Centric project', which encompasses the CRM strategy, was implemented, contributing to overall channel development and fueling the lead funnel for the channels, which include three primary ones (digital, physical, and remote) and one additional unique channel, GPL, which has specific characteristics. Additionally, the 'BILLUP projec't, which included the Billing system (using an SAP tool under an ERP solution), the 'Voice Analysis' tool for remote channels, and Movitel 4.0 used at GPS stores, served as complementary instruments in the customer-centric approach, enabling GALP to operate efficiently and strengthen customer relations.

According to Interview I and III, with the liberalization of the utilities market and the growth of GALP, S.A.'s business (first with the implementation of the natural gas network in 2011, and later with the commercialization of electricity in 2014) the B2C segments were developed alongside the already established B2B segments. Additionally, areas focused on loyalty and process improvements were created when GALP was experiencing momentum in terms of customer strategy. In fact, Interviewee II emphasizes that in 2020 a strong customer-centric culture was fully implemented within the Commercial BU, which was essential for facing competition and expanding into multinational markets. He also highlighted the ongoing improvements in client segmentation and micro-segmentation, noting that in the Residential area, these efforts were further supported by a developing clusters project.

However, the implementation of this new system had some challenges. Interviewees such as Interviewees I and II pointed out that the coexistence of legacy and new systems creates operational complexities that need careful management to avoid redundancies and inefficiencies. They also emphasized the importance of ongoing staff training and the

integration of various customer service channels to fully realize the benefits of CRM. Additionally, Interviewee III stressed the significance of channel strategy optimization and the need for a holistic approach to customer data management. She noted that achieving a "unified customer view" was a critical goal, which will allow GALP to deliver more personalized and efficient services. The interviewees highlighted the complexity of managing multiple customer interaction channels, including digital, physical, and remote channels. Responses indicate that while integration efforts were underway, significant challenges remain in providing a consistent experience across all channels. For instance, the Dynamics CRM system was scheduled to be gradually implemented until the end of 2025, but not uniformly across all channels. The structure and functions of GALP, S.A., shaped in part by its long history, add to this complexity. Previously, GALP used basic CRM platforms operating independently across different services, which hindered the ability to cross-reference information. This was evident with tools like ARPU, still in use at G&P, and Open SGC, which was employed for piped GPL. According to all interviewees, this situation presents major challenges: staff must navigate different platforms (e.g. ARPU and Dynamics 365), and consumers have an inconsistent experience since each channel function like an independent entity.

Interviewee II also notes that before these changes, client management was outsourced. As a result, GALP's client policy was weak and only became a central focus with the internalization of these functions. According to him, the channels currently using this tool include contact centres and stores, with plans to extend its implementation to stations as soon as possible. The internal setup of the Dynamics CRM was detailed in a diagram based on his answers. This diagram outlines the Customer Services under the Customer Care area, as well as Customer Experience, Front Office, and Customer Operations Centres, which encompass Residential, Mobility, and the Centre of Operations of Excellence (IT-based), all under the Customer Success area (Annex A – Figure 3). Interviewee I, who provided an overview of GALP's transformation process, also explains the workflow of information and client data at GALP (Annex A – Figure 4). The information was organized into two areas: i) Sales and ii) After-sales. In the sales area, no CRM system was directly used; however, the '3 Minutes' tool was employed to register information, which was then transferred to the CRM platform. With Dynamics CRM, it was possible to select and customize specific applications according to the

company's needs (such as the previously mentioned 'Mundo Galp'), aligning with business requirements and enabling client data mapping, a significant advancement in customer policy efficiency.

Furthermore, the interviewees highlighted the need for GALP to differentiate its value proposition in the Utilities market, particularly in a competitive environment. The implementation of CRM will enhance this differentiation by enabling more personalized and integrated customer offers. The responses suggested that the company sees the implementation of CRM as an opportunity to improve operational efficiency and reduce costs. This was especially evident in the discussion, regarding the need for automation and the consolidation of systems that allow better customer segmentation and cross-selling. All the interviewees emphasized that it would be easier for GALP and its salespeople to build closer relationships with clients by accessing real-time information and understanding their profiles. This approach could enable a better understanding of customer needs and help solve their problems, which in turn increases the company's efficiency and enhances service quality. The Head of Residential also noted that the resulting profits could create indirect value for customers by being shared with them through discounts, special offers, and other incentives, while the Head of Customer Success reinforced that increasing the company's income was a primary goal of GALP's transformation efforts.

Finally, since CRM implementation was in its early stages, according to interviewees no formal feedback had been collected from the channels, and assessment parameters hadn't been fully developed. However, according to Interviewee III, the feedback that was being collected from Sales was oriented towards customer perspectives, such as market value. Interviewee II also refers to both the transactional and relational NPS scores for evaluating customer satisfaction.

5. DISCUSSION AND RECOMMENDATIONS FOR THE COMPANY

This chapter focused on discussing the results obtained from the action research project concerning CRM implementation within the E&U sector at GALP S.A. It aims to integrate the experience gained and the information and data collected during the internship in the Residential Sales area of the Commercial BU, along with insights from

qualitative interviews and theoretical and academic knowledge from the literature review, which resulted in the proposed 'Conceptual Framework' presented in Sub-chapter 4.1.

Although this was an initial phase of the action research, concentrating on the early implementation of the Centric Project and CRM Dynamics, it also serves as an opportunity to identify any drawbacks and establish guidelines and recommendations for the company.

5.1. Final Discussion

The final discussion results from a reflection primarily based on the interview's results presented in Sub-chapter 4.4 and the frame of reference based on the literature review Sub-chapter 4.1. So, this discussion was structured in two steps: first, by applying the CRM analysis model proposed, based mainly on the works of Payne and Frow (2005; 2013) and Ngai et al. (2009); and second, by comparing the table of key features, based on the work of Pellegrini (2021), to determine if GALP, S.A. is aligned with its international counterparts in the E&U sector regarding CRM implementation and it's characteristics.

5.1.1 CRM model application

Considering the proposed CRM model and the information gathered from qualitative research, it can be said that GALP, S.A. effectively addresses the 'Strategy Development Process,' where business strategy takes precedence, followed consequently by customer strategy. As Interviewee II clearly stated, "It's not just about improving the customer experience (…). It's about improving GALP's performance first, and then improving the customer experience" (Interviewee II, 2024). Additionally, Interviewee I described customer value as an indirect benefit, while the company gains direct value. Therefore, the success of CRM implementation relies on a strong connection between these two dimensions.

The responses also highlight the second key process, the 'Value Creation Process', which involved two aspects: the value received by the organization through reduced acquisition costs, and the value delivered to customers through discounts, cross-selling, and other benefits.

Regarding the ‘Multichannel Integration Process’, this was a complex issue due to GALP’s long history and the varied business practices of the past. On the one hand, GALP relied on external services; on the other hand, it used different tools for data collection, it being nearly impossible to integrate client information across different channels. Therefore, this was one of the main reasons for the new CRM investment and digital transformation taking place at GALP S.A. Improvements were being made and managed, despite the use of various sources and the complex structure of the Company. The goal was to enable channels to access individual client profiles through effective mapping, which, hopefully, will enhance the integration process to achieve a "unified customer view", as mentioned by Interviewee III.

Once again, the ‘Information Management Process’ poses a significant challenge for GALP due to the previous use of numerous CRM tools and the dispersion of information. This difficulty has been confirmed by all interviewees but was being addressed by the new Center of Operations and Excellence, which handles IT-related issues (Annex A – Figure 3).

Finally, the ‘Performance Assessment Process’, it was not established due to the recent implementation of the entire system. Consequently, this fifth key process, essential for accountability and measuring CRM performance and its objectives as defined by the strategy, still requires development. However, Interviewee III and Interviewee II referred to other tools for assessing client satisfaction, an important aspect when considering competition, as mentioned in Chapter 3, section 3.1.2.

Considering the interviewees' perspectives on client management through the implementation of the new CRM, it was anticipated that the four proposed stages - Customer Identification, Customer Attraction, Customer Retention, and Customer Development - were being implemented. This was not surprising given that GALP’s trademark had been established for a long time and was a strong and well-recognized brand, particularly among profitable clients (as mentioned in Chapter 3). Direct marketing and encouraging customers to place orders through multiple channels - enabling the organization to cross-reference information - were among GALP's major efforts. This included the creation of the ‘Channel Strategy and Optimization’ mentioned by Interviewee I and the establishment of the mentioned Centre of Operations Excellence within the ‘Customer Success’ services, as noted by Interviewee II. Additionally,

Interviewee III highlights that one-to-one marketing, including individual customer profitability, loyalty programs, and complaints management, has long been a focus of GALP. Finally, the clear advantages of Dynamics CRM recognized by all the interviewees, were individual customer profitability analysis, customer value analysis, and the so called cross-selling (kamakura, 2007) opportunities.

5.1.2. Benchmarking CRM: GALP's Position Within the Energy & Utilities Industry

According to the main characteristics already proposed in Chapter 4, sub-chapter 4.1, one can confirm a close relation between GALP and the E&U counterparts, what is summarized in the table I below.

Table I. Comparing GALP S.A. position with general qualitative analyses of the Energy & Utilities Industry

CRM characteristics	Energy & Utilities	GALP, SA.
Technology option	Integrated CRM solutions	YES (attested by Interviewee I, II, III)
Dominant type of CRM	Operational & Strategic CRM	YES (attested by Interviewee I and II)
Business strategy	Costumer Intimacy	YES (attested by Interviewee I and III)
Costumer strategy	Micro-Segmentation	YES (attested by Interviewee I and III)
CRM strategy	Managed Service & Support	YES (attested by Interviewee I and II)
Barriers to CRM success	Lack of skills inbuilding and using a new IT-based CRM system	IN PART (attested by Interviewee I, II, III))
The main challenge	Address the issue of connecting people, purpose-driven profit and planes	YES (attested by Interviewee I and III)

Source: Author

Like other prominent companies in the E&U industry previously studied (Pellegrini, 2021), GALP, S.A. was opting for an integrated CRM solution with a strong focus on both operational and strategic CRM. This choice was driven by the front-office's need for automation (as mentioned by Interviewee II), high concerns with service quality (as noted by Interviewee I and Interviewee III), and the necessity to improve interaction between different channels to provide a consistent customer experience. As stated, this was a significant problem for the Company, as it was unable to cross-reference customer data efficiently between different channels, resulting in inconsistent experiences depending on the channel and contact point. GALP's intention was to gradually solve this

issue by implementing the Dynamics CRM and other compatible tools with strong operational and strategic components, as explained by all interviewees. Operational excellence was fundamental to this effort, as evidenced by the services set up.

Additionally, creating a one-to-one relationship with clients to deeply understand individual preferences and behaviours - tailoring experiences and solutions, and anticipating needs - reflected a customer intimacy business strategy through micro-segmentation. This proactive approach, as clearly explained by the Head of Residential, can lead to increased customer satisfaction and long-term relationships. The implementation of loyalty programs and the design of campaigns that reward specific customers (e.g., energy-saving or long-term customers) were also important measures that support this customer-focused business strategy. Thus, as was typical in the E&U sector and as explained by the interviewees, although the market was primarily divided into B2B and B2C segments, products and services were fully customized for individual customers, with micro-segmentation and clustering used to support marketing across different commercial areas.

Managed Service and Support (MSS) can also function as a CRM strategy by enhancing customer relationships, improving service quality, and driving customer satisfaction and loyalty, key areas that GALP's managers were eager to develop, as indicated in their interviews. In fact, MSS can serve as a powerful CRM strategy by delivering proactive, personalized, and efficient support to customers. In the E&U industry, adopting this customer-centric approach allows utility providers to meet customer expectations, fostering satisfaction and loyalty while simultaneously improving operational efficiency and gaining a competitive edge in a liberalized market.

Considering the barriers to the full implementation of the new CRM, two main drawbacks were identified: the integration challenges stemming from the previous CRM systems used by different channels and services, which currently result in some staff having to duplicate work by entering data into two separate systems; and the current difficulty in cross-referencing client data. Interviewees also mentioned the difficulties in training teams and the complexity of operating with multiple systems that were not yet fully integrated. However, the organization believes these issues will be resolved once the 'Centric project' is completed and Dynamics CRM is fully implemented. Although GALP was making significant investments in IT-based services and transforming its

company culture, as discussed in Chapter 3, there remained some uncertainty about information sharing between channels and the real potential for cross-selling, goals that managers were keen to achieve. This uncertainty exists within the context of legal issues, competitive pressures, and the sustainable and green objectives of the open E&U market. Indeed, this represents a major challenge for both the industry and GALP, S.A., as highlighted by the interviewees from the Residential Sales area.

5.2 Recommendations for Enhancing CRM Implementation at GALP, S.A.

As the analysis of the study's results indicated, there were several key recommendations that can significantly enhance the effectiveness of the CRM implementation at GALP S.A. The findings highlight areas where improvements can be made to ensure that the organization not only adapts to the complexities of its existing systems but also fully capitalizes on the capabilities of the new CRM.

Enhanced Staff Training and Support - Given the complexities associated with the coexistence of legacy systems and the new CRM, it is crucial to invest in comprehensive training programs. These should not only focus on technical aspects but also on change management to help employees adapt to new workflows and technologies (ADA Asia, 2023). Practical improvements are required in this area, as indicated in sub-section 5.1.2, which highlights that these challenges were common to the Utilities and Energy sector.

Phased Rollout with Continuous Feedback Loops - Implement the CRM system in phases, allowing time for testing and refinement at each stage. Establish continuous feedback loops where staff can report challenges and suggest improvements, ensuring the system evolves to meet operational needs effectively. The importance of carefully managing the rollout of the CRM system cannot be overstated. Emphasizing the necessity of testing and gradual implementation, a phased approach combined with continuous feedback is fundamental for refining the system during deployment (FlairsTech, 2023). However, it was worthed noting that there has been no official feedback reported from the various channels to date. This lack of input underscores the need for establishing robust mechanisms to gather insights from staff and stakeholders, ensuring that the CRM implementation was responsive to the operational realities and challenges encountered within the organization.

Integration of Legacy Systems - Develop a robust strategy for the integration of legacy systems with CRM Dynamics 365. This could involve creating middleware solutions or APIs that facilitate seamless data exchange, reducing the burden on staff and improving data consistency across platforms (Damsten, 2023). Integration challenges within GALP, particularly related to harmonizing new CRM tools with existing systems, emphasize the critical need for developing robust integration strategies. This can be effectively achieved by using APIs and middleware, which facilitate seamless data exchange between different systems. Such an approach enhances operational efficiency and ensures that customer data is readily accessible across platforms, ultimately supporting the effectiveness of CRM implementation.

Customer-Centric Data Governance - Establish a dedicated team responsible for data governance to ensure that customer data is accurate, secure, and consistently updated across all channels. This will help achieve the 'unified customer view' that is crucial for personalized services and effective cross-selling strategies (FlairsTech, 2023). The research indicated that this is a significant challenge within the industry, and GALP's restructuring reflected the company's awareness of emerging trends and evolving industry needs.

Advanced Analytics for Customer Insights - Leverage the capabilities of CRM Dynamics 365 to implement advanced analytics tools. These can provide deeper insights into customer behaviour and preferences, enabling more effective segmentation, targeted marketing, and personalized customer experiences (ADA Asia, 2023). Again, this corresponded to a big challenge of the E&U sector, and current 'digital transformation' of GALP is the way forward. All managers are conscientious and mentioned the potential of CRM to enhance customer segmentation and personalization, pointing to the need for leveraging advanced analytics tools within the CRM system to gain deeper insights into customer behaviour.

Regular Performance Reviews and Adjustments - Set up regular intervals for reviewing the CRM system's performance using clearly defined metrics (FlairsTech, 2023). This should include customer satisfaction scores, efficiency metrics, and feedback from various departments (ADA Asia, 2023). These reviews should be used to make necessary adjustments to the system and processes. Although not yet implemented, two of the

interviews recognized the importance of ongoing evaluation and adjustment of the CRM system.

Cross-Departmental Collaboration - Encourage collaboration between different departments, particularly those involved in customer service, marketing, and IT. This collaboration will ensure that the CRM system supported the needs of all stakeholders and helps achieve organizational goals more effectively (Damsten, 2023). Despite the ongoing restructuring, there was a clear necessity for better alignment among different departments, especially regarding channel strategy and optimization. This underscores the recommendation to foster cross-departmental collaboration to create a more cohesive CRM strategy. Such collaboration is essential for ensuring that all teams work towards common goals and effectively contribute to the overall success of CRM implementation.

Enhancing Customer Engagement Channels - As part of the CRM strategy, GALP should explore the expansion and enhancement of customer engagement channels, including mobile apps, social media, and AI-driven chatbots (ADA Asia, 2023). These channels can provide more responsive and personalized interactions, further improving customer satisfaction. The integration of various customer engagement channels into the CRM system is crucial for improving responsiveness and customer satisfaction. This area has been identified as a critical point, highlighting the need to expand and enhance these channels to effectively meet customer needs. Research indicated that addressing this challenge was essential for the overall success of CRM implementation.

Focus on Long-Term CRM Strategy - While the immediate goal was to streamline operations and improve customer relationships, GALP should also consider the long-term potential of CRM. This includes exploring how CRM can support broader strategic goals such as sustainability initiatives and deeper customer loyalty programs. Also, it aligns with the recommendation to focus on the long-term potential of CRM.

Additionally, insights from the literature review, along with the proposed model and comparative table, reinforce the significance of adopting this strategic perspective, particularly within the Energy sector.

6. CONCLUSIONS

This study focused on the implementation of CRM Dynamics 365 at the Residential Sales area of GALP, S.A., and analysed how this tool could optimize customer relationship management in a highly competitive industry. By combining an extensive literature review with the data collected during the internship, including insights from interviews with key managers, it was possible to identify both the benefits and challenges of this implementation process and answer the three main questions presented in the Introduction (Chapter 1).

The implementation of CRM tools like Dynamics 365 significantly impacts the E&U industry by enhancing the ability to manage complex customer relationships in a sector characterized by its regulatory environment, market liberalization, and the growing emphasis on sustainability. Unique characteristics of the E&U sector include the need for managing large-scale customer data, ensuring regulatory compliance, and supporting a customer base with diverse needs ranging from residential consumers to large industrial clients. CRM tools facilitate the transition to a more customer-centric approach, enabling companies to provide personalized services, improve operational efficiency, and better respond to evolving market demands, particularly in the context of energy transition and decarbonization efforts. As showed in section 5.1.2, GALP, S.A. by adopting CRM Dynamics 365 and going through a 'digital transformation' was completely aligned with the industry policies and behaviours at a larger scale, following principal CRM's features of the E&U sector.

The integration of this CRM tool offered several benefits, including the centralization of customer data, improved customer segmentation, and the ability to deliver more personalized services. The tool supported the company's strategic shift towards a customer-centric business model, allowing for better cross-selling opportunities and enhanced customer retention. Thus, with the new CRM system implementation, GALP S.A. is in the process of responding positively to a proficient customer strategy process, as evidenced by the analysis using the conceptual framework (Fig. 1), which represents one of the primary theoretical contributions of this study.

However, the integration process presents challenges, particularly related to the coexistence of legacy systems, which creates operational inefficiencies and complexities in data management. Additionally, the need for extensive staff training and the phased

rollout of the CRM system requires careful planning to minimize disruptions and ensure a smooth transition.

To optimize the use of CRM Dynamics 365 within the Residential Sales area, GALP should focus on several key strategies. First, it is essential to provide comprehensive training and support to ensure that staff are proficient in using the new CRM system and can fully leverage its features. Additionally, a phased implementation approach should be adopted, allowing for continuous feedback from users. This will enable the system to be adjusted and refined to better meet operational needs.

Another critical aspect was the integration of legacy systems with the new CRM. Developing solutions that ensure seamless data flow will help reduce operational redundancies and improve overall efficiency. Moreover, GALP should utilize CRM's advanced analytics capabilities to gain deeper insights into customer behaviour, which will enable more effective targeting and personalization of services. Cross-departmental collaboration could be crucial; fostering this will ensure that the CRM supported a unified approach to customer management and enhances the overall efficiency of the organization. Therefore, recommendations outlined in section 5.2 should be carefully considered by the Company, representing an important practical contribution of this research for the ongoing CRM implementation at GALP S.A.

Nonetheless, it is important to acknowledge several limitations in this approach. Firstly, the scope of the study was primarily focused on the implementation of CRM Dynamics 365 within the Residential Sales area / Commercial BU - of GALP S.A., where it was in fact being set up. While this focus offered valuable insights, it limits the generalization of the findings across other business units within GALP, or even other companies in the Energy & Utilities sector.

Additionally, the principal data collection methods relied on interviews of key managers, which, although providing in-depth qualitative insights, was a short sample, and may introduced a degree of subjectivity and bias. The perspectives gathered might not entirely reflect the experiences of all employees or the various challenges faced at different organizational levels.

The study also concentrated on the early stages of CRM Dynamics 365 implementation, which means that the findings were somewhat preliminary. They may

not capture the long-term challenges and benefits that could emerge as the system becomes more integrated into GALP's operations.

Furthermore, the rapidly changing technological landscape in the E&U sector, alongside evolving market conditions and regulatory requirements, could impact the relevance of the findings over time. The study's recommendations were grounded in the current state of technology and market dynamics, which could shift, necessitating ongoing adjustments to GALP's CRM strategy.

For future research, a longitudinal approach could be valuable, tracking the long-term impacts of CRM Dynamics 365 on GALP's operational efficiency, customer satisfaction, and overall business performance. This would provide a more comprehensive understanding of the system's effectiveness and any evolving challenges over time. Whenever further developments in Dynamics CRM implementation could take place, expanding the scope of the research to include other areas/departments within GALP, such as marketing, and industrial sales, could offer a more holistic view of CRM's impact across the organization, helping to identify department-specific challenges and opportunities.

Incorporating quantitative methods, such as surveys or data analytics, in future studies could provide for more evidence of the CRM system's impact. For instance, analysing changes in key performance indicators (KPIs) before and after implementation could help quantify the benefits in terms of customer retention, sales growth, or operational efficiency. Comparative studies with other companies of the Portuguese E&U sector, or across different industries, would also help identify the best practices and lessons that could applied on a broad scale.

Lastly, as emerging technologies such as artificial intelligence (AI) and machine learning (ML) become increasingly integrated with CRM systems, future research could explore how these advancements might further enhance customer relationship management. This could involve conducting case studies or pilot projects within GALP to assess the potential and practical applications of these tools.

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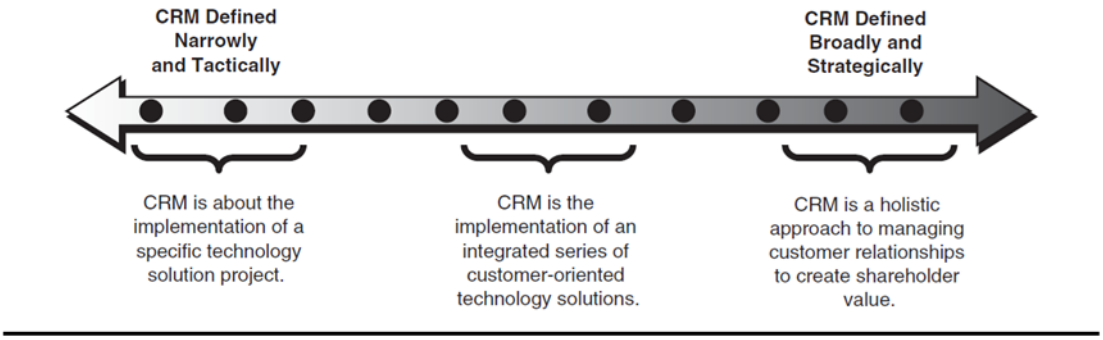
APPENDIX

Annex A

FIGURE 1
The CRM Continuum



Source: Payne and Frow, 2005.

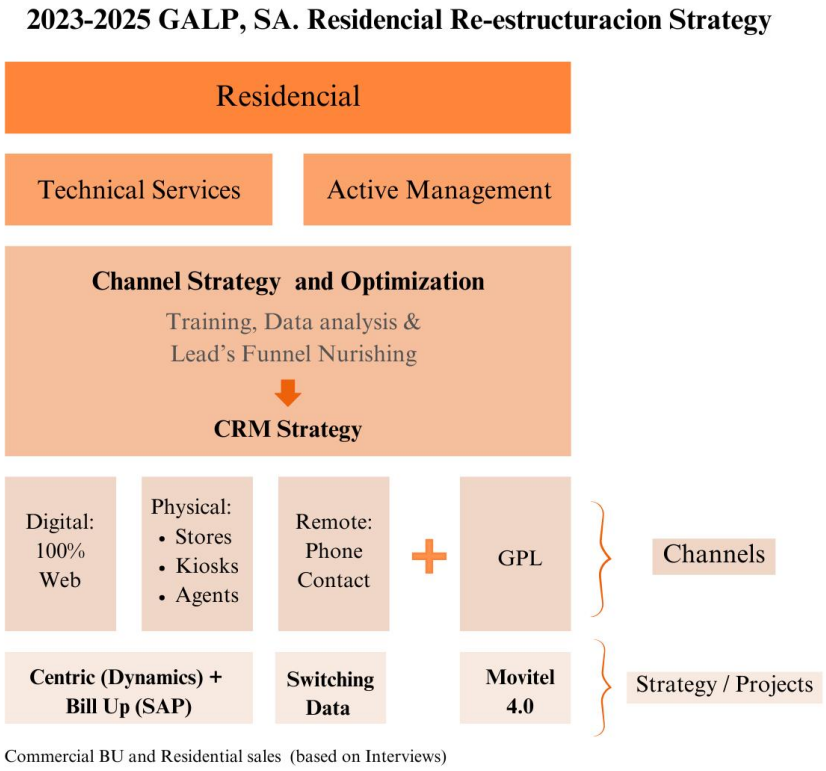


Figure 2. Diagram of restructuration of Commercial BU and Residential area / GALP S.A.
Source: Author

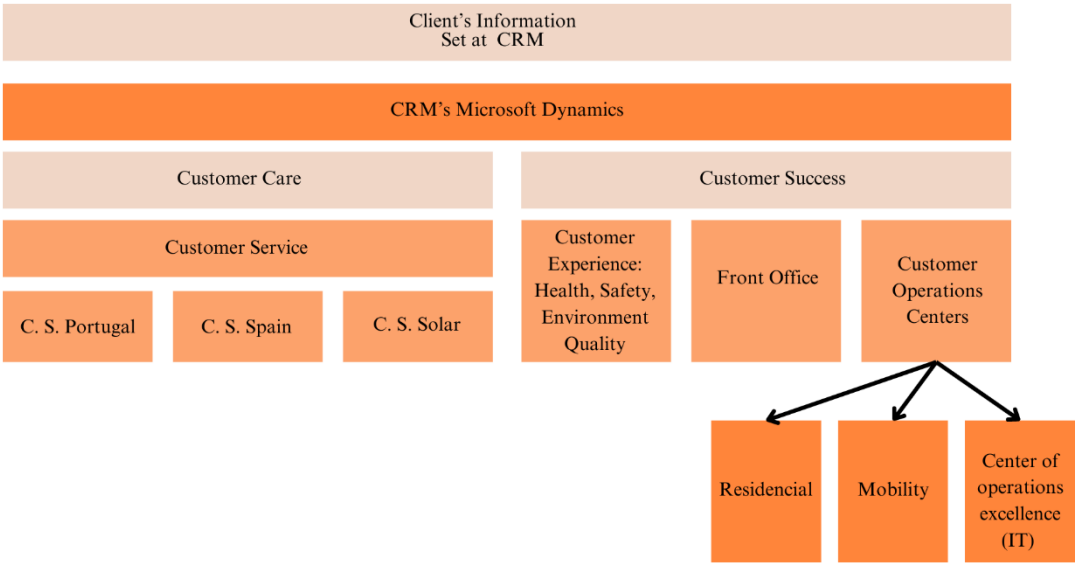


Figure 3. CRM organization at GALP SA. Source: author.

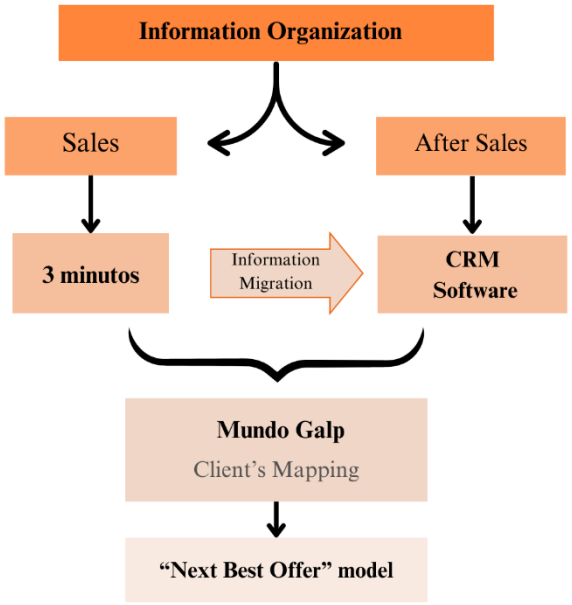


Figure 4. Information Organization inside the GALP SA. Source: author.

Annex B

Table I. Fundamental concepts supporting conceptual framework and its relationship with literature review. Source: Author

CRM	Usually defined as a tool/ process for managing customer interactions / information.	Levitt (1983), Gummesson (1987), and Grönroos (1990), Payne and Frow, 2005; Ngai, 2005; Kotler and Armstrong, 2016
	It is a complex term with a multidisciplinary nature, which has not yet reached a precise and universally accepted definition.	Ling & Yen, 2001; Buttle, 2004; Winer, 2001; Payne and Frow, 2005; Ngai, 2005; Ngai et al, 2009; Rababah et al, 2010; Rababah, 2011
	According to some authors emerges from 'relationship marketing' or database marketing and improves marketing productivity.	Sheth and Parvatiyar,1995; Ryals and Payne, 2001, Parvatiyar and Sheth, 2001a; Kumar and Reinartz 2012; Buttle and Maklan 2019
	But it got an imperative connection with IT and SI, being closely related to its advancements.	Ryals and Payne, 2001; Payne and Frow, 2005; Ngai et al, 2009; Greenberg, 2010; Buttle and Maklan 2019; Pellegrini, 2021
	As well as with strategies business shifts; therefore, should be faced as a 'strategic framework' emphasizing customer value and relationship continuity.	Payne and Frow, 2005; Payne and Frow, 2013; Ngai et al, 2009
Strategy development process	Two ways strategy concerning business and costumer, where business should be first considered.	Payne and Frow, 2005; Payne and Frow, 2013
Value creation process	The two ways flow creation value between costumer and organization.	Payne and Frow, 2005; Payne and Frow, 2013; Pellegrini, 2021
Multichannel integration process	Joining strategies and value creation outputs transforming it in value-adding activities for costumers.	Payne and Frow, 2005; Payne and Frow, 2013; Pellegrini, 2021
Information management process	Consumers data gathering and its treatment and management by means of complex IT and analytic systems and tools.	Payne and Frow, 2005; Payne and Frow, 2013; Pellegrini, 2021

Performance assessment process	Results assessment and implementation of strategy improvements.	Payne and Frow, 2005; Payne and Frow, 2013; Pellegrini, 2021
Customer Identification	Targeting most profitable costumers or population most likely to become profitable customers.	Swif, 2001; Parvatiyar and Sheth, 2001a; Kracklauer et al, 2004; Woo et al 2005; Ngai et al, 2009
Customer Attraction	Resources and effort application to attract target customer segments.	Swif, 2001; Parvatiyar and Sheth, 2001a; Kracklauer et al, 2004; Ngai et al, 2009
Customer Retention	Central policies to maintain customer.	Swif, 2001; Parvatiyar and Sheth, 2001a; Kracklauer et al, 2004; Ngai et al, 2009
Customer Development	Customer lifetime value analysis.	Swif, 2001; Parvatiyar and Sheth, 2001a; Kracklauer et al, 2004; Ngai et al, 2009
Customer value	Perception of customer relationships as value exchange it concerns costumers' profitability for the organization.	Woo et al 2005; Ngai et al, 2009; Doligalski, 2015.
One-to-one relationship strategy	Foster relationships with selected (profitable) customers rather than with all.	Schneider et al., 1995; Payne and Frow, 2005; Ngai et al, 2009; Pellegrini, 2021
B2B and B2C segments	Business-to-business and business-to-consumer relationships.	Payne and Frow, 2005; Payne and Frow, 2013; Pellegrini, 2021
Croos-selling	Is an old and valuable technique used by salespeople to increase order size and to transform single-product buyers into multi-product ones, which more recently, evolved into a strategy for CRM	kamakura, 2007.

Table II. Qualitative Analyses of the Energy & Utilities Industry. Source: author.

CRM implementation characteristics	**Energy & Utilities Industry**
Technology option	Integrated CRM solutions
Dominant type of CRM	Operational & Strategic CRM
Business strategy (currently carried on)	Customer Intimacy
Customer strategy	Micro-segmentation

CRM strategy	Managed Service & Support
Barriers to CRM success	Lack of skills inbuilding and using a new IT-based CRM system
The main challenge	Address the issue of connecting people, purpose-driven profit, and planet

Table III. Sample Characterization. Source: Author

Interviewee	Role	Gender	Age	Years of Experience	Background
1	Head of Residential Iberia	Male	50 years	21 Years	With a background in chemical engineering and an MBA in management, began his career in GALP's technical commercial sector, developed the B2B commercial area, and became responsible for the northern region and industrial clients. It was the responsible for the direct channels within the B2C commercial sector, and recently became the head of Residential Iberia.
2	Head of Customer Success & HSEQ	Male	51 years	24 Years	With a background in Economics, he has held leadership positions in the telecommunications sector (PT, Altice, ZON), managing strategic marketing, product management, and customer services. He later joined METLIFE as head of the Marketing Office in Portugal and, subsequently, in Europe. In 2020, joined GALP S.A. to create Commercial GALP.
3	Head of Channel Strategy & Optimization	Female	53 years	28 Years	With a background in chemical engineering and a master's in Energy, developed a scientific research profile at GALP, where she has worked for the past 27 years in various client-focused areas, including commercial, loyalty, process optimization, digital development, digital channel development, and digital channel communication.

Table III. Interview questions identification. Source: Author

	Interview I	Interview II	Interview III
Job position of interviewee	Head of Residential Iberia	Head of Customer Success & HSEQ	Head of Channel Strategy & Optimization
Interview date	12/02/2024	15/02/2014	20/02/2024
Interview duration	47m 29s	30m 51s	38m 5s
Questions: Interviewed background	Q1- Could you please introduce yourself, as well as your academic and professional background leading up to your role at GALP?	Q1- Could you please introduce yourself, as well as your academic and professional background leading up to your role at GALP?	Q1 - Could you please introduce yourself, as well as your academic and professional background leading up to your role at GALP?
Department characterization	Q2 - How do you describe the Residencial area and how it is structured?	Q2 – Your department works with the Residencial area? how it is structured?	Q2 – How is structured your department, and what organization have?
Strategy Development Process *Business Strategy*	Q3 - Would you say that GALP, namely the Residential area has a consumer-orientated strategy?	n.a.	Q3 – Currently, would you say that GALP is becoming more consumer-orientated?
	Q4 - The new CRM has been implemented throughout all the Commercial department, or just in the Residential area? How long did this implementation take?	Q3 - The new CRM has been (Dynamics) as been implemented throughout all the Commercial department, or just in the Residential area?	Q4 - One of the aims of CRM is making cross selling but this is difficult, since nowadays you need to use different tools to do it; is that the case?
	Q5 - What was the main reason to change the CRM tool at GALP?	n.a.	Q5 – Diversity of tools and cross selling difficulties, are the main reason for new CRM implementation?
Costumers Strategy	Q6 - In terms of customer strategy, what are the main expectations for this CRM implementation?	Q4 - In terms of customer strategy, what are the main expectations for this CRM implementation? The idea is providing the better experience to Clients?	Q6 - what are the main challenges of this CRM implementation?
	Q7 - Would you say this CRM allows you to segment customers more efficiently and do you consider it important for market segmentation?	n.a.	n.a.

Value Creation	Q8 - Do you believe that this new CRM tool is going to be more helpful in the analysis of existing and potential customer base?	Q5 - Do you believe that this new CRM tool is going to be more helpful in the analysis of existing and potential customer base?	n.a.
	Q9 - What value can GALP provide to its customer and what value can the company receive from its customers?	Q6 - Would you say that providing a better experience to clients is a main objective? What value can GALP provide to its customer and what value can the company receive from its customers?	n.a.
	Q10 - Do you consider that CRM increases efficiency and reduces costs within the company?	Q7 - Do you consider that CRM increases efficiency and reduces costs within the company?	n.a.
Multichannel Integration Process	Q11 - Could you identify the channels through which GALP business interacts with customers?	n.a.	n.a.
	Q12 - Considering costumers' use is there a difference between digital and presential channels?	n.a.	n.a.
	Q13 - All of them use the new CRM?	Q8 - What are the channels using the CRM?	Q7 - In what channels will be implemented the new CRM? Only in the ones that work directly with clients?
	Q14 - Considering physical and virtual channels use, what are the biggest challenge in the implementation of the CRM software?	Q9 - Considering physical and virtual channels use, what are the biggest challenge in the implementation of CRM software?	n.a.
Performance Assessment Process	Q15 - Do you have feedback from the channels regarding the way the CRM implementation is running?	n.a.	Q8 - Do you have feedback from the channels regarding the way the CRM implementation is running?
	Q16 - Is the level of process automation measured within GALP,	n.a.	n.a.

	namely in the Residential area?		
	Q17 - What are the metrics used by Galp to evaluate CRM's software performance?	Q10 - Is there any way to measure the efficiency of Dynamics through customer retention processes?	Q9- There are any metrics to evaluate CRM's software performance?
	Q18 - Is the costumers' satisfaction and the customers' retention used as metrics for CRM evaluation?		Q10 - Currently, how do you evaluate or measure the customer satisfaction?