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Change management in CRM system upgrade

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ABSTRACT:
This master's thesis examines the role of change management in the context of a customer relationship management (CRM) system upgrade. Technology-driven changes, such as CRM system upgrades, often pose challenges to organizational structures, processes, and employee engagement. Although several theoretical models have been developed for change management, their fragmented application and lack of contextual guidance have been considered practical challenges.

The aim of this thesis was to develop a general change management model that is particularly suitable for technological changes such as CRM system upgrades and use it as a framework to analyze and identify development areas in the case organization's change management plans. The model was constructed through a literature review and is based on four well-known theoretical frameworks: Lewin's three-steps model, Kotter's eight-phase model, the ADKAR model and McKinsey's 7S framework. Based on these, a six-phase model was formed, which combines individual and organizational perspectives, as well as structural and cultural factors. The model also considers the critical literature discussion, which has highlighted the excessive linearity and lack of contextual flexibility of many traditional models. The empirical part was implemented as a qualitative case study in an organization where the CRM system was being upgraded. The data was collected through semi-structured thematic interviews with three key individuals participating in the project. The interview data was analyzed using thematic analysis, and the findings were reflected in the developed theoretical model.

The results showed that the organization's change management plans contained many important elements, such as a clearly defined need for change and vision, training plans, and initial structures for monitoring progress. However, significant shortcomings were found, especially in the definition of change management responsibilities, two-way communication structures, and planning for long-term change implementation. Ownership of the change remained decentralized, and employee involvement was uneven across work streams. These factors had an impact on the coherence and credibility of the overall change within the organization.

This thesis contributes to change management research by proposing a theoretically grounded model that integrates several commonly used change management theories into a unified framework in the context of CRM system upgrades. Although the model has not been empirically validated, it provides a structural tool to support the planning and analysis of technology-driven changes. At a practical level, this thesis also offers concrete development suggestions for the case organization, especially in the areas of communication, clearly assigned change responsibilities, and the long-term follow-up of the change.

KEYWORDS: change management, CRM system upgrade, change management model, organizational change, employee engagement, leadership in change, change communication

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Tiivistelmä:
Tämä pro gradu -tutkielma tarkastelee muutosjohtamisen roolia asiakkuudenhallintajärjestelmän (CRM) päivityksen yhteydessä. Teknologialähtöiset muutokset, kuten CRM-järjestelmien päivitykset, aiheuttavat usein haasteita organisaation rakenteille, prosesseille ja henkilöstön sitoutumiselle. Vaikka muutosjohtamista varten on kehitetty useita teoreettisia malleja, niiden hajanaista soveltamista ja kontekstisidonnaisen ohjeistuksen puutetta on pidetty käytännön haasteina.

Tutkielman tavoitteena oli kehittää yleinen muutosjohtamisen malli, joka soveltuu erityisesti teknologisiin muutoksiin, kuten CRM-järjestelmäpäivityksiin, ja käyttää sitä viitekehyksenä tapausorganisaation muutosjohtamissuunnitelmien analysointiin ja kehityskohteiden tunnistamiseen. Malli rakennettiin kirjallisuuskatsauksen avulla ja pohjautuu neljään tunnettuun teoreettiseen viitekehykseen: Lewinin kolmen vaiheen malliin, Kotterin kahdeksanvaiheiseen malliin, ADKAR-malliin ja McKinseyn 7S-viitekehykseen. Näiden pohjalta muodostettiin kuusivaiheinen malli, joka yhdistää yksilö- ja organisaatiotason näkökulmia sekä rakenteellisia ja kulttuurisia tekijöitä. Mallissa huomioidaan myös kriittinen kirjallisuuskeskustelu, jossa on tuotu esiin monien perinteisten mallien liiallinen lineaarisuus ja kontekstuaalisen joustavuuden puute. Empiirinen osuus toteutettiin laadullisena tapaustutkimuksena organisaatiossa, jossa CRM-järjestelmää oltiin päivittämässä. Aineisto kerättiin puolistrukturoiduin teemahaastatteluin kolmelta projektiin osallistuneelta avainhenkilöltä. Haastatteluaineisto analysoitiin temaattisen analyysin avulla, ja havaintoja peilattiin kehitettyyn teoreettiseen malliin.

Tulokset osoittivat, että organisaation muutosjohtamissuunnitelmat sisälsivät monia keskeisiä elementtejä, kuten selkeästi määritellyn muutostarpeen ja vision, koulutussuunnitelmat sekä alkuvaiheen rakenteita muutoksen etenemisen seurantaan. Merkittäviä puutteita havaittiin kuitenkin erityisesti muutosjohtamisvastuiden määrittelyssä, kaksisuuntaisen viestinnän rakenteissa ja pitkäaikaisen muutoksen juurruttamisen suunnittelussa. Muutoksen omistajuus säilyi hajautettuna, ja henkilöstön osallistaminen oli epätasaista eri työvirroissa. Nämä tekijät vaikuttivat muutoksen kokonaisuuden johdonmukaisuuteen ja vakuuttavuuteen organisaation sisällä.

Tämä tutkielma edistää muutosjohtamisen tutkimusta ehdottamalla teoreettisesti perusteltua mallia, joka yhdistää useita yleisesti käytettyjä muutosjohtamisen teorioita yhtenäiseksi viitekehykseksi CRM-järjestelmäpäivitysten kontekstissa. Vaikka mallia ei ole validoitu empiirisesti, se tarjoaa rakenteellisen työkalun teknologialähtöisten muutosten suunnittelun ja analysoinnin tueksi. Käytännön tasolla tutkielma tarjoaa myös konkreettisia kehitysehdotuksia tapausorganisaatiolle erityisesti viestinnän, selkeästi määriteltyjen muutosvastuiden ja muutoksen pitkäaikaisen seurannan näkökulmista.

KEYWORDS: change management, CRM system upgrade, change management model, organizational change, employee engagement, leadership in change, change communication

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Abbreviations

CRM	**Customer Relationship Management**
ERP	**Enterprise Resource Planning**

1 Introduction

To remain competitive in the ever-changing operating environment of today's world, organizations must also be ready to change constantly. When the operating environment is unstable, organizations must react just as quickly and at a closer pace. (Brown & Eisenhardt, 1997, p. 1; Bruch, Gerber & Maier, 2005, p. 97). Change processes can significantly affect the organization's operation and personnel commitment, and their success requires a clear plan and effective management and leadership (Kotter, 1996, p. 18-21). Making a change in an organization has been characterized as a very difficult task. Basically, there are no easy and fast working solutions for implementing change. However, it is important for organizations that the changes can be implemented successfully, because poorly implemented change projects may harm the organization in terms of success and corporate culture. There are many different studies on how different change projects have failed precisely because of weak change management. (Laurila, 2017; Lindell, 2017, p. 1; Ewenstein, Smith, & Sologar, 2015).

Therefore, it is important to understand how change can be managed, for example in technological projects that have a crucial impact on the organization’s operations. Change management requires intellectual risk-taking, open discussion and the ability to adapt to a changing operating environment. Organizations and change leaders face many challenges at the same time, such as the aging of personnel, the need for retraining, the diversity of work, the different leadership needs of different generations, and the demands brought by remote work and technology. (Stenvall & Virtanen, 2007, p. 19). This highlights that the utilization of a change management model is vital for organizations, as it provides a structure and a clear direction for managing changes.

1.1 Research Gap

Previous literature has extensively discussed change management in organizational change situations and information system projects. For example, several studies have identified critical success factors for ERP and CRM system implementations, such as top

management support, user training, and communication during the change (Mendoza et al., 2007; Hornstein, 2015). These factors are closely related to change management, as they emphasize the importance of considering people and processes in the success of a technology project. However, research that specifically focuses on existing CRM system upgrade projects from a change management perspective is currently scarce. Previous studies have focused on either technical implementations or the use of a single change model, but little attention has been paid to how several well-known change management models could be combined and utilized in a practical case project. Previous studies have often focused on either technical implementations (Shaul & Tauber, 2013) or the application of individual models (Sittrop & Crosthwaite, 2021) but combining several models has not been studied much in the context of CRM upgrade. This constitutes a clear research gap: the literature lacks information on how classical change management frameworks together can guide and explain the implementation of a CRM system upgrade. This Master's thesis aims to address this gap.

1.2 Research goals and structure of the work

As mentioned earlier, change management is an important part for organizations to succeed in today's constantly changing operating environment. A lot has already been written about the topic and there are already many different service providers in the area to help with change management. Almost every one of them follows some kind of change management model, whether it is their own version of some model(s), or they use some commonly known model. From that, it can be concluded that the safest way to implement change management is to follow some general structure and rules.

The purpose of this thesis is to generate new knowledge and understanding of the implementation of change management in technology projects, especially in the context of CRM system upgrades. This knowledge has both scientific and practical significance. Theoretically, this thesis complements the change management literature by combining four well-known models into a unified framework and examining their theoretical applicability by comparing them with a real-world CRM system upgrade case. On a practical

level, this thesis provides organizations with practical recommendations on how to prepare and lead personnel in similar change projects effectively. This thesis was commissioned by an organization that operates in the electronic financial management software industry. The organization is in the middle of upgrading their CRM system. For this reason, this new change management model should be applicable in e.g. CRM system upgrade in organizations. This thesis will also include a review of the case organization's change management plans regarding their current CRM system upgrade and compare these plans to this general change management model. The purpose is to find out how the organization's change management plans differ from the constructed change management model, and how these plans could be improved. When building a change management model, the weaknesses of used change management models that emerge from previous studies are clarified, and an attempt is made to pay attention to these stumbling blocks.

The research questions for this thesis are:
RQ1: How would a general model of change management look like based on literature?
RQ2: What are the change management plans in CRM upgrade of the case organization?
RQ3: What are the differences between the general model and case organization's plans – what can we learn from this project?

This thesis aims to answer the first research question by observing and presenting previous commonly known change management models and research of the topic and then building a new general change management model based on those. This will be done in chapter 2. The second research question will be answered by conducting interviews with the people responsible for the change management of this project in the organization. The last research question will be answered in chapter 5 by making a comparison between the results of the interviews and the general change management model built before.

At the beginning of this thesis, the focus is on building a general change management model, including its purpose, theoretical premises and practical applications, especially in connection with CRM system upgrades. After that, the research method is discussed, and interview data collected from the case organization is analyzed. This is followed by a comparison between the case organization's change management plans and the theoretical model. The model is not empirically tested or validated in this thesis but is used as a theoretical framework for analyzing and interpreting the change management plans of the case organization. At the end, the research results and their significance are presented. Also practical suggestions as well as suggestions for further research are made.

2 Building a General Change Management Model

Change management plays a big role in implementing successful change in organizations. This also applies to updating the CRM system. Saeed's et al. (2011) research emphasizes that change management measures, such as top management support and cooperation between departments, are central to the success of CRM projects. Sittrop's and Crosthwaite's (2021) study examines how one of the world's most famous change management models, Kotter's change management model, can be applied in the implementation of CRM systems to minimize risks. The results of the study show that effective change management is central to the success of CRM projects. As Moran and Brightman (2001) state, change management can be defined as the process of systematically renewing the organization's direction, structures and opportunities.

In this chapter, a general change management model is built. The first sections will define the purpose and scope of the model. After that, we will establish theoretical and practical foundations by exploring the four of the most common change management models. This is followed by special emphasis on the challenges and opportunities related to the usage of the discussed change management models during information system updates. At the end of the chapter, we will establish the general change management model.

2.1 The Purpose and Scope of the Model

Using a change management model is a key part of an organization's success when moving to new technological solutions, such as a CRM system (Toté, 2024). The purpose of this model is to provide a clear framework to help organizations plan, implement and incorporate change into their day-to-day operations. In this section, we focus on defining the purpose and scope of the general change management model and outline its application areas, especially in the context of CRM systems.

2.1.1 Why is a Change Management Model Necessary

There are many studies that show that successful changes within organizations have been made by following some kind of change management model. Sittrop's and Crosthwaite's (2021) study the application of Kotter's model in the implementation of a customer relationship management system (CRM). They found that using the model reduced risks and increased the value and utilization of the system in the organization. Magnúsdóttir (2018) studied the use of Kotter's model in the implementation of the strategy of a large consulting company. Their research showed that the application of the model helped to identify success factors and areas for improvement in the change process. Stephen (2023) tells in her article how Microsoft has utilized another general change management model, the ADKAR model, to improve its customer relations and ensure the successful implementation of changes. With the help of the model, awareness of the need for change has been built and stakeholders have been engaged effectively.

All these studies are united by the fact that it is important that a clear change management model is used when planning organizational changes. Such a model serves as a guideline and helps to manage the different stages of change systematically.

2.1.2 Objectives of the Model

Explicitly defining goals at the initial stage of model design is essential, as it guides the entire development process, helps to allocate resources appropriately, and enables the evaluation of the model's effectiveness (Thomas & Hodges, 2010). This general change management model aims to support the organization in the controlled and successful implementation of the CRM system upgrade. The goals can be divided into strategic, operational and social areas. At the strategic level, the aim of the model is to ensure that the organization can form and maintain a clear and credible change vision that consistently guides the entire change and strengthens the personnel's understanding and commitment to the process. At the operational level, the model aims to clarify

responsibilities and roles, develop effective communication and training practices, and create conditions for the effective implementation and continuous monitoring of the change. At the social level, the aim of the model is to genuinely and actively involve the personnel in the change, develop the organization's ability to change, and reduce resistance to change through open dialogue and systematic support. Overall, the model aims to create conditions in which organizational change management is systematic, participatory and continuously evolving, so that the results of the change are sustainable and ingrained into the organizational culture.

2.1.3 Target Audience and Application Areas

Defining the target audience is a key part of the model development process, as it ensures that the model appropriately responds to the needs and contextual requirements of its users. The usability and effectiveness of a model depend on how well its structures, concepts and procedures resonate with the operating environment and competence profile of the end users (Gregor & Hevner, 2013). For example, the design science research framework emphasizes that the development of an artifact – or more generally, any conceptual solution such as a theoretical model – should consider a clearly defined problem and the users operating in its context, so that the solution is both relevant and usable (Hevner et al., 2004).

The change management model is primarily aimed at organizations and experts who implement extensive, technological changes – especially CRM system upgrades or similar information system projects. The key target audience of the model therefore consists of the organization’s management, project managers and experts working in change management, human resources management and IT systems, whose task is to coordinate, communicate and lead the practical implementation of the change. The model offers its target audience a practical tool for the successful planning, management and long-term implementation of changes.

Although the primary application area of the model is CRM system upgrades, its structural flexibility also enables its application more broadly in connection with digital system projects and other changes in the organization's operating methods. The model is particularly suitable for contexts where complex challenges related to technology implementation are highlighted, such as complex dependencies between different systems, the diversity of personnel skills and a constantly changing operating environment. However, the use of the model is not limited to technology projects but can also be applied to other types of change projects that require a systematic, participatory and iterative approach, as well as active involvement of personnel and continuous feedback collection.

Overall, the model provides organizations and experts in various application areas with an easily accessible and practical framework for implementing and managing change. Therefore, it is well suited to a variety of organizational environments and offers clear benefits, especially for those organizations that seek to systematize and streamline their change management processes in a constantly changing operating environment.

2.2 Theoretical and practical starting point

Building the general change management model for this thesis begins by reviewing previous models and theories on the subject. This happens mainly by focusing on the four most common change management models. This section discusses each of those separately. First, we focus on Lewin's change management model (Lewin, 1947) and Kotter's 8-step model (Kotter, 1996), then the focus shifts to ADKAR change management model (Hiatt, 2006), and the last object of the review is the McKinsey's 7S change management model (Waterman et al., 1980).

2.2.1 Lewin's change management model

Kurt Lewin's Frontiers in Group Dynamics (1947) provides a comprehensive foundation for the theory of change management, especially his later three-stage model, in which the key elements are unfreezing, changing, and refreezing. Lewin was a pioneer in social

psychology, and he developed his change model as early as the mid-1940s, applying his field theory to practice. The model is based on the idea of an organizational force field, where forces that promote and resist change influence the behavior of individuals and groups. (Juuti & Virtanen, 2009). Lewin (1947) describes in detail how social systems tend toward a permanent state, but can change when subjected to strong enough forces, which lays the foundation for understanding the process of change. Lewin's (1947, p. 26-28) analysis of quasi-stationary equilibrium shows that change requires destabilizing the existing balance and weakening the forces that resist change, which is an essential part of the first stage of his model of change. Lewin (1947, p. 29-30) presents the forces that either support or oppose change and emphasizes that a leader must identify and manage these forces in order for change to be successful. This idea forms the basis of Lewin's force field analysis, which is widely used in change management. Lewin (1947, p. 30-33) also states that involving groups in change is central to Lewin's work, as he emphasizes that community participation increases the acceptability and permanence of change. According to Lewin, change is most effective when the group actively participates in the process, which is reflected in his change model in the phase where the change is implemented together with the group.

Cummings et al. (2016) argue that Lewin never developed his model himself, they say that it only took its form after his death. However, Burnes (2004) describes in detail how Lewin's three-phase model was built on his earlier research and became part of a broader approach to planned change. Figure 1 presents visualization of the model. Burnes (2004) explains that the first part of the three-stage model, unfreezing, is based on Lewin's observation that human behavior is bound to a state of equilibrium, maintained by opposing forces that influence thought and action. In order to change, this equilibrium must be disturbed. The second stage, moving or changing, means moving towards new ways of acting. Lewin did not believe that the direction of change would be easily predictable but emphasized the importance of experimentation and learning. This corresponds to the thinking of action research, in which change is done in stages: studying, acting, and studying again. The third stage, refreezing, is the establishment of new

behavior as part of the permanent functioning of a group or organization. According to Lewin, change will not last unless it is in harmony with the individual's other behavioral patterns and the environment. Therefore, change is most effective at the group level, where norms and shared routines also change. In organizations, this often means changing culture, practices, and structures.

Figure 1. Lewin's three-steps model (According to Porsci 1, 2024).

Cummings et al. (2016) explain how Lewin's model has often been criticized by other researchers for over-simplifying the change process. For example, Kanter (1992) states that Lewin's model is too rigid and simplistic for the dynamic and continuous nature of change in modern organizations. They argue that the idea of "refreezing" is outdated, as it implies a state of stability that is rarely found in today's business environments.

Later change theorists have often expanded Lewin's three stages into more detailed stages. For example, Ratana et al. (2020) state that many models of the 1980s and 1990s can be seen as extensions of Lewin's three stages: Arnold Judson added five stages (analysis, communication, acceptance, change, consolidation), Rosabeth Moss Kanter presented the "10 Commandments" for implementing change, and several others developed models with 7–8 steps. John Kotter's famous 8-step process from 1996 was partly based on Lewin's basic idea and Kanter's work. It can therefore be said that Lewin's model formed the theoretical basis of planned change for many later models.

2.2.2 Kotter's change management model

Kotter's 8-step change management model is one of the best known and most widely used theories for managing organizational changes (Change Strategists, 2023). McLaren

et al. (2022) states that Kotter's model is the most influential approach in the change practitioner community. The model was developed by John P. Kotter in 1996 and aims to provide a systematic and step-by-step approach to successfully implementing change. Kotter especially emphasizes the human-centered factors of change, such as creating urgency, communicating the vision and engaging the personnel. The eight stages of the model form a clear structure that enables organizations to plan and manage change effectively.

In 1996 Kotter (1996) predicted rightly that the business environment would become more and more unstable and volatile. He emphasized that organizations that would not be able to change successfully would suffer serious consequences. He built the model by stating common errors that organizations make when trying to change. After that, he presented how these errors can be avoided and then built the 8-step model from these suggested fixes.

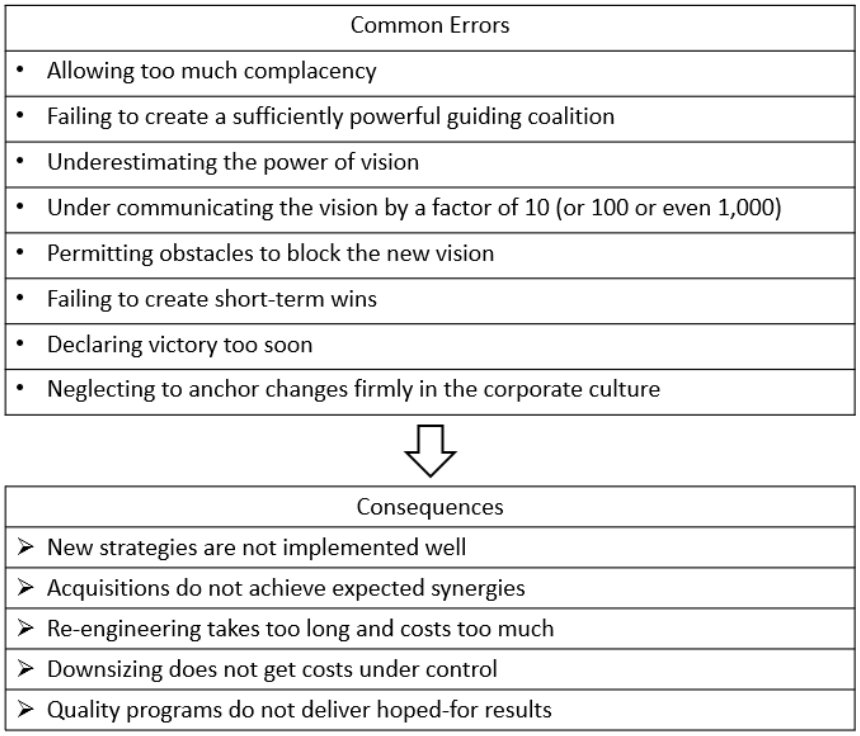

Figure 2. Common errors and consequences during change in organizations (According to Kotter, 1996 p. 16)

As Figure 2 shows, Kotter (1996) listed eight different common errors that organizations make when trying to make a change in organization. Those errors are Allowing too much complacency, failing to create a sufficiently powerful guiding coalition, underestimating the power of vision, under communicating the vision by a factor of 10 (or 100 or even 1,000), permitting obstacles to block the new vision, failing to create short-term wins, declaring victory too soon, and neglecting to anchor changes firmly in the corporate culture.

According to Kotter (1996), eight key mistakes prevent successful organizational change. The first mistake is the lack of a sense of urgency – if the organization allows for excessive complacency, the need for change does not feel real. This leads to new strategies being poorly implemented. The second mistake is the lack of an insufficiently influential steering group; without a leading and committed team, change remains superficial, and the desired synergies of, for example, acquisitions are not achieved. The third mistake is underestimating the power of the vision – without a clear and inspiring direction, changes in different parts of the organization do not support each other and do not create the necessary motivation. The fourth mistake is related to under-communicating the vision. If employees do not receive frequent and credible communication – both in words and actions – they will not commit to the change and are not willing to make the required sacrifices. The fifth mistake is allowing obstacles to get in the way of change, which frustrates personnel and stops development. Such obstacles can, for example, lead to re-engineering not progressing or being too costly and time-consuming. The sixth mistake is neglecting short-term successes. Without concrete and quickly visible progress, employees can become fatigued or join the resistance to change. The seventh mistake is declaring victory too early – when the change has not yet been rooted, the new direction can easily revert to old ways. This is reflected, among other things, in the fact that, for example, downsizing aimed at controlling costs does not bring the desired financial effects. The eighth mistake is failing to anchor the change in the organizational culture. Without this, the change remains temporary, and for example, quality programs do not produce the expected results.

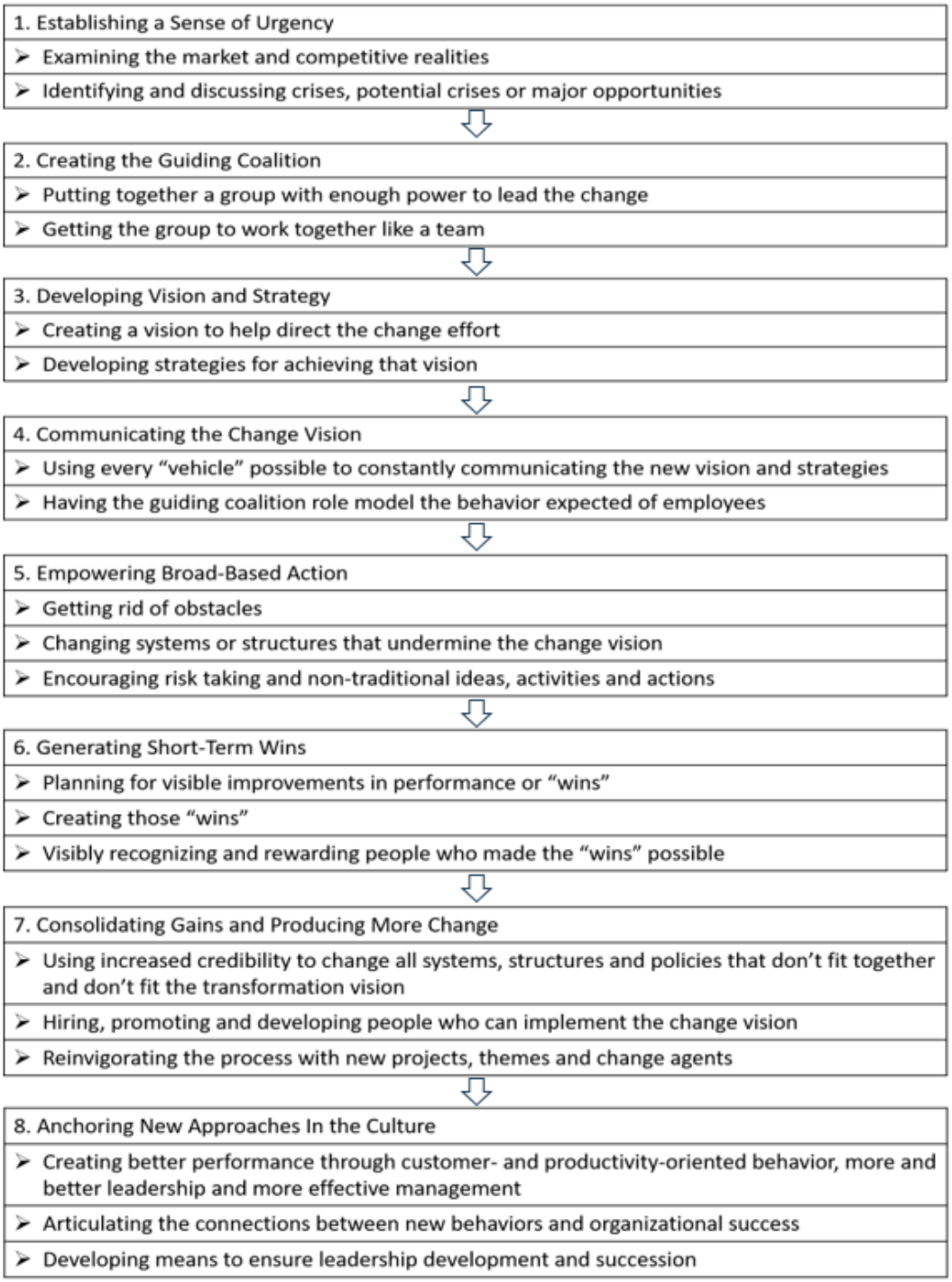

Figure 3. The 8-step Process of Creating Major Change (According to Kotter, 1996 p. 21)

Kotter (1996) developed his eight-phase change model in response to typical mistakes that prevent successful organizational change. Figure 3 presents visualization of the

model. The model progresses logically from one phase to the next. First, a sense of urgency is created by honestly examining the challenges and opportunities in the market and operating environment. In the second phase, an influential and committed steering group is assembled to lead the change. In the third phase, a clear vision and strategy are defined that give direction to the change. In the fourth phase, the vision is communicated widely and repeatedly, and management must act as an example of the desired change. In the fifth phase, obstacles to change are removed, risk-taking is encouraged, and structures are ensured to support the new direction. In the sixth phase, short-term successes are created and recognized that strengthen belief in the change. In the seventh phase, the credibility achieved is utilized to implement deeper changes and engage the right people. In the final stage, new operating methods are anchored in the organization's culture by connecting them to successes and developing leadership and structures that ensure continuity.

Kotter's model has also received its part of criticism. McLaren et al. (2022) are particularly critical of the model's way of creating a sense of urgency through fear and avoidance motivation, which can increase employee anxiety and resistance. They suggest that change management should also identify and communicate what remains the same and build a sense of urgency through approach motivation – emphasizing the positive possibilities of change. This would allow change to be implemented in a more socially responsible manner and in a way that better supports employee well-being. It has also been criticized for being linear. Pollack and Pollack (2015) report in their case study that in one change situation, several parts of Kotter's process had to be implemented in parallel in different parts of the organization and change agents "jumped" back and forth between the phases as the situation required.

2.2.3 ADKAR change management model

ADKAR is a relatively new change management model developed by Jeff Hiatt in the late 1990s as part of a project at the research organization Prosci. Hiatt sought to understand why some organizational changes succeed and others fail, and studied hundreds of

organizations to understand this difference. (Brusati, 2024). The name of the model is an acronym for five consecutive stages that describe an individual's path to change: Awareness (awareness of the need for change), Desire (desire to participate and support the change), Knowledge (knowledge on how to change), Ability (ability to implement the required skills and behaviors) and Reinforcement (reinforcement to sustain the change). ADKAR focuses specifically on the people-centered aspect of change: its basic assumption is that organizations will not change unless people change. Theoretically, ADKAR is based on the behavioral idea that people go through predictable stages of change, and that by supporting each stage, the change can be “tackled” in the organization. The model is practical and easy to adopt, and it focuses on the change experience of individuals as part of a broader organizational change project. (Brusati, 2024).

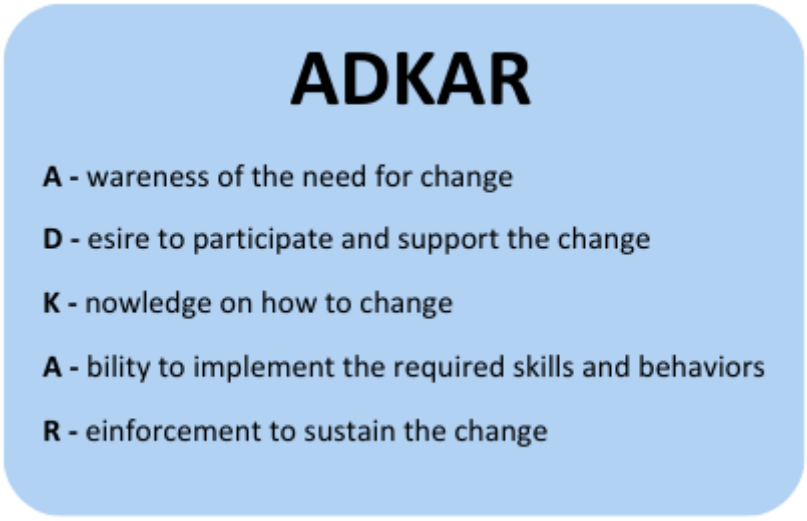

Figure 4. ADKAR model (According to Hiatt, 2006).

The model is made up of five sequential stages that describe an individual's change process and must occur in order for the change to be successful. Figure 4 presents visualization of the model. The first stage, Awareness, refers to the individual’s understanding of why change is necessary. It includes both internal and external factors that underline the need for change, as well as an understanding of what the change means to that person. The next stage, Desire, refers to the individual’s personal motivation to support and

participate in the change. This is based in part on the individual's values, experiences, and how the change affects their role. The third stage, Knowledge, emphasizes competence: the information, skills, and training needed to implement the change. However, knowledge must be translated into practical action, which occurs in the Ability stage. In this stage, the individual demonstrates that they are able to apply what they have learned and implement new actions. The final stage, Reinforcement, aims to make the change permanent. It includes mechanisms such as recognition, reward and internal satisfaction of the individual, which help new ways of acting become part of everyday life and prevent a return to old habits. The ADKAR model emphasizes that the order of these stages is important: for example, the ability to implement change cannot arise before acquiring the necessary knowledge, and knowledge cannot be learned without internal motivation. The model provides a practical structure for leading individual-level change and can also be used to identify at what stage the change process may stop or encounter resistance. (Hiatt, 2006).

In the case study by Ikhram (2019), a company updated its enterprise resource planning (ERP) system using Hiatt's ADKAR model and McKinsey's 7S framework, which will be discussed next, to manage the change process. The application of the models highlighted the human factors in the success of the system renewal: in particular, it was found that the lack of awareness among employees of the necessity of change (the Awareness phase of the ADKAR model) weakened the effectiveness of the project. The use of the ADKAR model contributed to identifying the causes of resistance to change and highlighted the need to strengthen communication of the change and employee training, but resistance in the initial phase of the project, which was caused, for example, by employee's fear of changing work roles, was a challenge.

2.2.4 McKinsey's 7S framework

McKinsey's 7S framework was first introduced in the article Structure is Not Organization by Robert H. Waterman, Tom Peters and Julien R. Phillips (1980). The model emerged as a reaction to the one-sided emphasis on structure in organizational development.

According to the authors, in addition to structure, several other interrelated factors must be considered in order to understand and implement the organization's operations and change in a comprehensive way. They name seven key elements that together form the 7S framework: structure, strategy, systems, style, staff, skills and superordinate goals. The last of these refers to the organization's shared values, purpose and goals. Therefore the “superordinate goals” term has been later changed to “shared values” term.

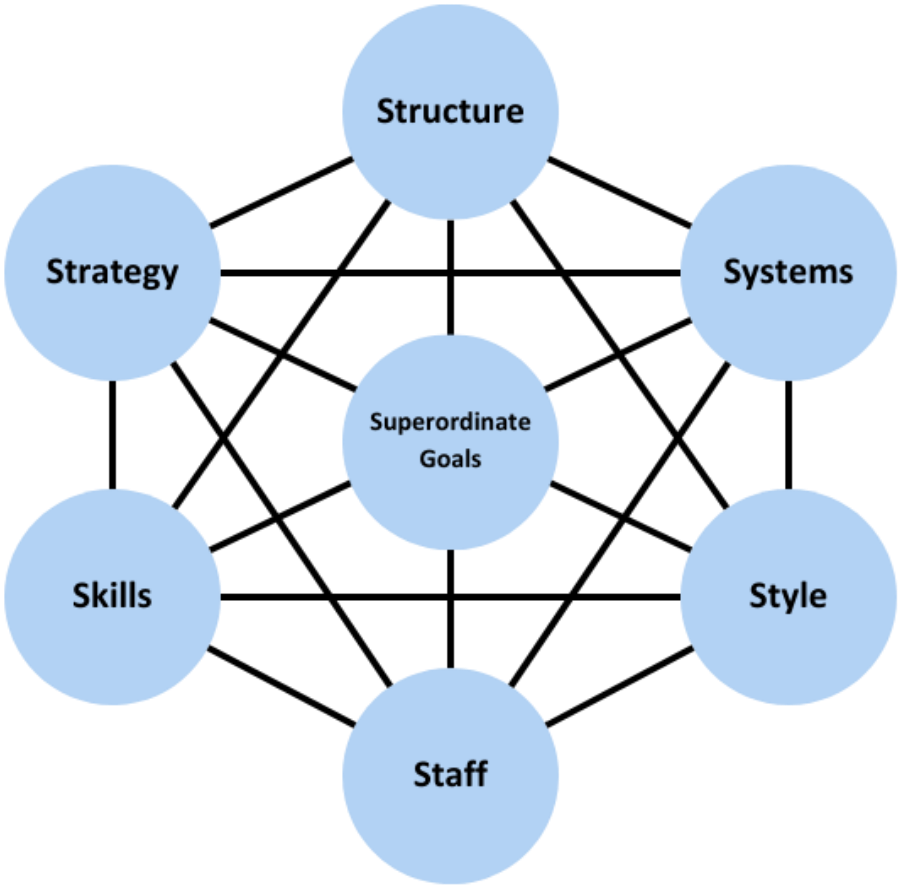

Figure 5. McKinsey's 7S framework (According to Waterman et al., 1980).

The model's premise is that these seven factors are strongly interconnected, and one area cannot be changed without affecting the others. This can be seen in Figure 5, which presents visualization of the model. In other words, effective organizational change requires the coordination of these areas. The model thus offers a systemic perspective on organizational management and understanding change processes. Its applicability is

particularly evident in situations where, in addition to structural changes, cultural, human and strategic restructuring is needed. For example, structural change without considering the related systems, staff skills or shared values often leads to failure of implementation. Similarly, a strategy may be logical and well-formulated, but its implementation will fail if the organization's systems do not support its implementation, the staff are not committed, or the necessary skills are missing. The style component emphasizes the importance of management behavior: organizational culture is shaped more through management actions than words, and the success of change also depends on how well management communication and actions are aligned with the desired changes. The staff and skills dimensions highlight the need to examine both personnel development and the organization's core competencies. For example, new strategic directions often require the construction of entirely new capabilities, which in turn requires the dismantling of old, potentially contradictory, ways of operating. Shared values refer to the purpose of an organization that provides direction and continuity in a rapidly changing operating environment. They act as the glue that binds the parts of the organization together and gives meaning to change. Ultimately, the 7S framework provides a way to look at an organization in a multidimensional and coherent way. It helps to understand why restructuring alone is rarely enough to change effectively and why examining "soft" factors such as culture and skills is just as necessary as "hard" factors such as strategy and structure. The value of the model is especially emphasized in change situations, where the coordination of different parts of the organization determines the success of the change process. (Waterman et al., 1980).

Ravanfar's (2015) empirical research supports this perspective by showing how the model can be used to assess the current state of an organization and identify areas for improvement. For example, his study found that several 7S areas in the organizational structure of the Qeshm Free Zone, such as shared values, staff, and structure, were weak and required action. This demonstrates the model's usefulness in systematically examining change readiness. However, the 7S framework is not a linear process model, but rather serves as a framework that helps identify areas that need attention in managing

change (Ravanfar, 2015; Waterman et al., 1980). In the previously mentioned case study by Ikhram (2019), where a company updated its enterprise resource planning (ERP) system using Hiatt's ADKAR model and McKinsey's 7S framework to manage the change process, Ikhram emphasized that the 7S framework helped to comprehensively examine the organization's strategy, structure, systems and culture to permanently embed the ERP change in the company's operations.

2.3 The applicability of change management models in information system changes

The applicability of change management models to information system changes has been discussed in several studies, and their utilization, especially in CRM and ERP projects, has been analyzed from different perspectives. This subsection first reviews previous studies related to change management practices in information system changes, and then analyzes the applicability, strengths, and limitations of the models.

2.3.1 Previous studies about change management in information system update

Lech's (2016) study highlights that deficiencies in change management are one of the most significant reasons for failure in information system projects. In particular, Enterprise System projects (e.g. in the implementation of CRM systems), neglect of change management can lead to unclear goals, poor communication, insufficient participation and unsuccessful implementation. The study emphasizes that successful system change requires attention to several internal areas of the organization. These include, among others, the coordination of business processes and systems, clarifying the organizational structure and roles, developing personnel skills and identifying cultural and communication barriers. Lech (2016) suggests concrete solutions, including proactive training, the use of prototypes, active management of change needs and strong commitment to the project by project managers and key personnel. The study supports a holistic perspective on change management, in which change is not managed solely as a technical project, but as a broader organizational change.

Rivard's and Lapointe's (2012) study focuses on user resistance in the implementation of information systems and how those responsible for implementing the system respond to this resistance. The study suggests that resistance is not always negative, but can also be functional, in which case it highlights the problem areas of the system or the change. Responding to resistance is a key part of change management in information system changes, and the researchers identify four main response strategies: inaction, acknowledgment, rectification and dissuasion. Of these, rectification proves to be the most effective, if it targets the right cause of resistance – for example, technical shortcomings, lack of competence or usability problems. Reactions that do not correspond to the real cause of resistance can, in turn, worsen the situation. The study emphasizes the importance of communication, interaction and credibility in successful change management and warns organizations against reacting too straightforwardly without sufficient analysis. The article reinforces the view that in information system changes, it is essential to understand the users' perspective and lead the change not only technically, but also by considering people's experiences and attitudes.

Shaul's and Tauber's (2013) systematic literature review provides a comprehensive picture of the critical success factors for the successful implementation of ERP systems. CRM systems can be compared to ERP systems to some extent, as the implementation of both requires extensive change management that affects the processes, structures, competences and culture of the organization. Shaul's and Tauber's (2013) study analyzed 341 articles from 1999–2010, and based on this, in addition to technical solutions, organizational, human and cultural perspectives are particularly emphasized. Although the term "change management" is not used explicitly, the results of the study strongly reflect the key aspects of change management: management commitment, clear communication, personnel training, coordination of organizational structure and processes, and consideration of cultural specificities. User engagement and training, open communication, and identifying the impact of change at different levels of the organization are recurring themes in successful implementations. The research supports a holistic approach,

where CRM implementation is viewed not only as a technical project, but as a broader organizational change.

2.3.2 The applicability of each change management model

According to the previously showcased literature about change management on the implementation and upgrading of information systems, successful system change requires simultaneous consideration of the organization's structure, processes, personnel skills, and cultural factors (Lech, 2016; Rivard & Lapointe, 2012; Shaul & Tauber, 2013). These perspectives also come up strongly in change management models showcased in this study. Lewin's (1947) three-phase model particularly supports creating organizational readiness for change and embedding change by emphasizing the importance of clear communication and personnel involvement at the beginning and end of the change. Kotter's (1996) eight-phase model, on the other hand, comprehensively corresponds to the need described by Lech (2016) and Shaul & Tauber (2013) to systematically lead a change project from start to finish, including, among other things, creating and communicating a clear vision, empowering personnel, and embedding new ways of working as part of the organization's culture.

The ADKAR model (Hiatt, 2006) complements the above-mentioned perspectives, especially in supporting individual-level change, emphasizing awareness-raising, competence development and continuous reinforcement of change, which is in line with the user-centered approach of Rivard and Lapointe (2012). The McKinsey 7S framework (Waterman et al., 1980) offers the most comprehensive tool for the perspectives discussed in the texts, as it covers both technical (systems and processes), structural (organizational structure and roles) and cultural (shared values and skills) factors, which are particularly emphasized in the study by Shaul and Tauber (2013). Thus, these change management models support the prerequisites for successful information systems implementation in a diverse way and complement each other on both a theoretical and practical level.

2.3.3 Strengths of the models

All the change management models discussed in this thesis are united by their common observation that change management is multidimensional. Change is not achieved solely through technical implementation or management orders, but requires motivating personnel, adapting organizational structures and systems, and active and continuous communication. Research has confirmed several of the principles highlighted by these models. An analysis by Phillips and Klein (2023) found that 15 key strategies were repeated across different change management frameworks, the most frequently mentioned of which were effective communication, stakeholder involvement, supporting and encouraging personnel, taking organizational culture into account, and clarity of shared vision. These strategies form the very cornerstones that are also present in Lewin, the ADKAR model, McKinsey's 7S framework, and Kotter's 8-step model. It is therefore justified to state that these four models have a strong common foundation: successful change is understood above all as a human process, where success requires consistent communication, a clear vision and careful coordination of different parts of the organization. In addition, each model has its own specific strengths and emphasis: Lewin's model helps to clearly phase the change process, the ADKAR model delves into the experiences of individuals and offers concrete ways to manage resistance, McKinsey's 7S framework ensures the comprehensiveness of the change, and Kotter's model emphasizes project management precision and the importance of the active role of management and supervisors (Lewin, 1947; Hiatt, 2006; Waterman et al., 1980; Kotter, 1996).

2.3.4 Weaknesses of the models

Although the Lewin, Kotter and ADKAR models have gained great popularity in the field of organizational change management, their use also has significant limitations. Stouten et al. (2018) critically analyze these models and highlight that they share common weaknesses related to a simplified understanding of change, ignoring context and insufficient scientific evidence.

Lewin’s three-phase model (unfreeze–change–refreeze) is considered the theoretical foundation of change management, but according to Stouten et al. (2018), the model is too static and linear to respond to the dynamic operating environment of modern organizations. The model assumes that an organization moves from a clearly defined current state through change to a new equilibrium state. However, this does not correspond to today’s constantly changing and uncertain circumstances, where changes are often iterative, simultaneous and partly unpredictable. Furthermore, Lewin's model does not provide concrete tools for dealing with individuals' psychological or social reactions to change. (Stouten et al.,2018).

Kotter’s 8-step model is particularly criticized for its prescriptiveness and top-down approach. According to Stouten et al. (2018), the model gives the impression that successful change can be achieved by following a specific step-by-step formula. However, this approach does not consider the diversity of different organizational cultures, types of change, or situations. In addition, they state that the model’s excessive emphasis on management actions undermines employee experiences, the importance of inclusion, and the emotional dimensions of change. This is backed by Appelbaum et al. (2012) who highlight that Kotter's model has often been seen as too schematic and does not allow for sufficient adaptation during change. Sittrop’s & Crosthwaite’s (2021) study about implementation of CRM system using Kotter’s 8-step model found that although Kotter's model provided a consistent progression model, the outcome of the change could have been improved by considering certain factors related to change competence before and during the project. The advantage of the model was the structured process it provided for implementing the change, but the challenge was that simply following the model was not enough without developing the organization's competence and capabilities to support the change.

The ADKAR model, which focuses on individual-level change readiness (Awareness, Desire, Knowledge, Ability, Reinforcement), is considered useful in highlighting the employee perspective. However, Stouten et al. (2018) criticize the model for its one-sided

focus on the individual at the expense of the organization and context. The model does not address organizational structures, power relations, or cultural factors, which are often crucial, especially in large-scale and technology-driven changes. Furthermore, the scientific research behind the model is limited and is largely based on observations gathered from consulting practices.

In summary, Stouten et al. (2018) emphasize that while these models provide useful frameworks for structuring change processes, they are not sufficient on their own to explain or guide complex and context-specific change situations. They emphasize the need to combine scientific research and practical management methods in the field of change management and to develop more flexible, context-specific models that consider the different starting points of organizations and individuals.

2.4 Creating the model

This subchapter builds on the previously reviewed change management models to build a new change management model that is particularly effective in the context of CRM system upgrade. The model is created by taking inspiration from the simple structure of Lewin's (1947) model, the process-like nature and clear phasing of Kotter's (1996) model, the individual-centered perspective of the ADKAR model (Hiatt, 2006), and the comprehensive examination of internal organizational factors of McKinsey's 7S framework (Waterman et al., 1980). Table 1 presents phases of the new change management model and their theoretical foundations. The purpose of the model is to respond to criticisms of previous models and to consider the special features of CRM system upgrade, such as technological complexity, multi-level participation of personnel, and the long-term establishment of the change as part of the organization's operations. Although the structure of the model utilizes the logic of Lewin's (1947) three-stage model, this framework seeks to go beyond the simplicity of the original model by introducing an iterative and continuous perspective that responds to the complex change situations of contemporary organizations. Moreover, unlike Kotter's (1996) model, which has been criticized for being too schematic (Appelbaum et al., 2012; Stouten et al., 2018), this model allows the

steps to proceed in parallel and be repeated depending on the situation, allowing for flexible responses to changing circumstances. In addition, while the ADKAR model (Hiatt, 2006) provides a valuable perspective on individual change, the purpose of this model is to link individual-level change to the structural and cultural development of the organization by utilizing the holistic approach of McKinsey's 7S framework (Waterman et al., 1980). McKinsey's 7S framework (Waterman et al., 1980) has traditionally served as an analytical framework, but in this model its different components have been transformed into concrete change management measures that are linked to a practical action plan. The basic structure of the model is divided into six phases, which form a logically progressive body for the model. Those phases are reviewed next.

The first phase of the change management model, **Identifying the need for change and forming a vision for change**, emphasizes both the recognition of the need for change and the "unfreezing" phase of Lewin's (1947) model and the importance of vision in committing the organization, as emphasized by Kotter (1996). At this phase, the shared values dimension of the 7S framework should also be considered, as the vision for change should be based on the organization's shared values and long-term goals, thereby linking the change strongly to the organization's identity and purpose (Waterman et al., 1980). The recognition of the need for change is based on a critical assessment of the current state of the organization and a clear analysis of why change is necessary in this particular situation (Kotter, 1996). The vision for change must be concrete, clearly defined, and easily communicated and understood so that it can serve as a guide throughout the change process. At this stage, the role of management in particular is crucial, as a clearly communicated and credible vision strengthens the personnel's understanding of the meaning of the change and its goals (Hiatt, 2006; Kotter, 1996).

In the second phase, **Commitment and role assignment of management**, the model emphasizes the importance of the guiding coalition mentioned by Kotter (1996) and the consideration of the structural and management systems dimensions of McKinsey's 7S framework as well as the style dimension, meaning the operational example set by

management and interaction style, which can significantly affect staff trust and commitment during change (Waterman et al., 1980). The model sees management commitment to change as a key success factor, as without continuous and visible support from management, the implementation of change will easily be incomplete (Kotter, 1996). Clearly defined responsibilities and roles during the change process create a foundation that enables consistent implementation and decision-making. The model also recommends clear documentation and communication of responsibilities to all personnel, which increases confidence in change management (Waterman et al., 1980; Kotter, 1996).

In the third phase, **Communication and employee engagement**, the model combines the individual-centered Awareness and Desire phases of the ADKAR model (Hiatt, 2006) with Kotter's (1996) emphasis on the importance of open communication. At this stage, the style and staff dimensions of the 7S framework should also be emphasized: management's communication style and ability to create an inclusive atmosphere affect how personnel experience change and how commitment is built at different organizational levels (Waterman et al., 1980). The model suggests that systematic, open and two-way communication increases staff understanding of the rationale for change and helps reduce uncertainty and resistance. By actively involving staff already in the planning phase and maintaining that engagement throughout the change process, their commitment to change is enabled, as participation creates ownership and thus better conditions for the successful implementation of change (Hiatt, 2006; Kotter, 1996).

The fourth phase of the change management model, **Competence development and training**, focuses on developing staff competence and implementing training, drawing in particular on the Knowledge and Ability phases of the ADKAR model (Hiatt, 2006) and the principles of developing staff skills in the McKinsey 7S framework (Waterman et al., 1980). The model emphasizes that training should be tailored and targeted at different employee groups and their needs in implementing the CRM system. Furthermore, training should be ongoing so that staff are able to utilize the system effectively in the long term (Hiatt, 2006; Waterman et al., 1980).

In the fifth phase, **Implementation and monitoring of change**, the model utilizes Lewin's (1947) idea of the moving phase of change and Kotter's (1996) views on short-term successes and their importance for the ongoing maintenance of change. This phase emphasizes continuous monitoring and the ability to react quickly to problems that are detected. Regular feedback and transparent reporting on the progress of the change help to maintain staff motivation and ensure that goals are maintained. The model also emphasizes the achievement of intermediate goals, which can be used to demonstrate the concrete benefits of the change for the entire organization (Kotter, 1996; Lewin, 1947).

In the final stage, **Consolidation and evaluation**, the model utilizes Lewin's (1947) concept of refreezing and Kotter's (1996) ideas about institutionalizing change into organizational structures and practices. Successfully consolidating change requires continuous monitoring and evaluation, as well as developing practices based on observed experiences and feedback. Follow-up monitoring can ensure that changes are permanently rooted in the organization's culture and operations, thereby transforming the change into the organization's new normal (Lewin, 1947; Kotter, 1996). In consolidating change, the shared values, style and staff dimensions of the 7S framework should also be emphasized: shared values give the change permanence, operational example set by management maintains the new operating culture, and long-term development of staff ensures the continuity of the change (Waterman et al., 1980).

Table 1. Phases of the new change management model and their theoretical foundations.

Phase of the new model and theory behind it	**Lewin's**	**Kotter's**	**ADKAR**	**McKinsey's**
Identifying the need for change and forming a vision for change	X	X	X	X
Committing management and defining change management responsibilities		X		X
Communication and employee engagement		X	X	X
Competence development and training			X	X

Phase of the new model and theory behind it	Lewin's	Kotter's	ADKAR	McKinsey's
Implementation and monitoring of change	X	X		
Consolidation and evaluation	X	X		X

2.4.1 The model's suitability for agile development and a constantly changing operating environment

As Pollack and Pollack (2015), as well as Stouten et al. (2018) have highlighted, the modern business environment is constantly changing, and linear models are not best suited for this. Therefore, the model must consider how it will work in this kind of environment and around agile development. Although the created change management model is based on traditional linear change models, such as Lewin (1947) and Kotter's (1995) phased approaches, it can also be applied, with minor adjustments, to for example, agile development and the modern, constantly changing business environment. The basic principles of agile development include continuous value creation, iterative progress, and rapid response to changes in the environment (Beck et al., 2001; Highsmith & Cockburn, 2001). Responding to these principles requires the model to be flexible and have a cyclical structure, in which the phases of the model are constantly repeated and partially overlap.

In particular, the initial phases of the model, such as identifying the need for change and formulating the vision, should be utilized as continuous processes, not just as a one-off measure at the beginning of the project. This continuous assessment of needs and updating of the vision are essential for the organization to be able to react quickly to the changing demands of customers and the operating environment (Rigby et al., 2021). In an agile environment, employee involvement and communication are seen as continuous dialogue and feedback collection, which enable employee commitment and support their readiness for change in constantly changing circumstances (Hiatt, 2006; Beck et al., 2001).

In agile organizations, competence development and training are not isolated events, but continuous learning that supports the organization's operations. The principle of continuous learning ensures that employees' competencies remain up to date as technology and operating methods constantly change (Highsmith & Cockburn, 2001). In the implementation and monitoring phase of the model, special emphasis is placed on continuous iterative feedback collection and its utilization in implementing quick corrective actions. This approach corresponds to the idea of continuous improvement in agile development and supports the organization's ability to respond quickly to problems and challenges identified in the change process (Rigby et al., 2021).

In the last phase of the model, the consolidation of change, continuous reflection and utilization of learning in subsequent development cycles are seen as key. In this way, the change management model promotes continuous adaptability and supports the organization's resilience in an ever-changing environment. Therefore, the model created is also suited to the contexts of agile development and continuous change, with small changes in emphasis and through iterative cycling.

2.4.2 Visualization of the model

Visualizing a change management model is important because it promotes the model's comprehensibility and practical applicability. A visual presentation can be used to illustrate the key stages of the model, the connections between them, and the process-like and cyclical nature of change. Therefore, a visual presentation enhances communication, reduces the risk of misunderstandings, and facilitates the controlled implementation of change in the organization (Gaskin, 2025). Figure 6 presents the visualization of the model.

Figure 6. Visualization of the change management model (Based on Lewin 1947; Kotter, 1996; Hiatt, 2006; Waterman et al., 1980).

The cyclical nature of the model emphasizes the continuous and iterative nature of change. The observations and experiences identified during the consolidation and evaluation phase of the change form the basis for identifying new change needs, at which point the process may begin again. This approach helps the organization maintain its ability to respond quickly to changes in the operating environment and strengthen a culture of continuous improvement.

3 Research approach

The aim of this thesis is to examine change management in the context of a CRM system upgrade, both theoretically and practically. The research problem is to determine how would a general change management model based on the literature look like, what are the case organization change management plans to implement its own CRM upgrade, and how these two approaches differ from each other and what can be learned from them. To answer the research questions, a qualitative research approach has been chosen, which enables the construction of a theoretical model based on a literature review and a detailed analysis of the case organization's change plans using interview data. After this, a comparative analysis of the theoretical model and the practical case study helps to identify significant differences and similarities and to produce new information about change management practices and their applicability in the context of CRM system upgrades. The following subsections describe in detail the qualitative approach used in this thesis, the case study method, and the implementation of data collection and analysis.

3.1 Qualitative research

This thesis applies a qualitative research approach, which is appropriate when the subject of the study is phenomena that one wants to understand deeply in their own context. Qualitative research aims to describe and interpret the meanings that individuals or groups attach to their activities and environment (Eskola & Suoranta, 1998). The purpose of this thesis is to investigate how change management has been implemented in the context of a CRM system upgrade in a case organization, and to compare this implementation with a general model of change management based on the literature. Change management in organizations is by nature a multifaceted, dynamic and socially constructed phenomenon (By, 2005; Al-Haddad & Kotnour, 2015). For this reason, quantitative methods alone are not sufficient to provide a sufficiently in-depth understanding of the nuances, challenges and impacts of implementing change (Bryman & Bell, 2015).
Qualitative research design allows for the study of a phenomenon in its natural setting and focuses on understanding experiences, meanings, and interpretations (Eriksson &

Kovalainen, 2015). Since the change process under study includes organizational, cultural, and communication elements that are difficult to quantify numerically, qualitative research design offers the opportunity for in-depth and multifaceted analysis. Semi-structured interviews provide rich and detailed data that helps to understand both the perspectives of change planners and the factors behind their decisions (Silverman, 2024).

The research strategy used is a case study, which enables a detailed and context-specific examination of the target organization. Yin (2014) defines a case study as being particularly suitable when the research questions are of a "how" and "why" nature, and the researcher has no control over the events being studied. In this study, the case organization is an organization that is implementing a new CRM system. This provides a concrete and timely environment to study change management in connection with a system upgrade.

The case study consists of two main stages: A general model of change management is built using a literature review, which is based on scientific theories and previous research. This is followed by collecting empirical data from the case organization through semi-structured interviews, which are used to investigate how the organization has planned and implemented change management in a CRM project. Kallinen & Kinnunen (2021) emphasize that the semi-structured interview method guides the discussion but also allows space for the respondents' own perspectives.

The semi-structured interview method was chosen as the primary data collection method for this study, as it allows for a flexible but systematic approach to in-depth examination of the phenomenon under study. The method combines pre-formulated questions and open discussion, allowing the interviewer to adapt the questions to the situation and refine the answers, which is particularly useful when studying complex organizational changes and the views of different actors on them (Hirsjärvi & Hurme, 2008). In this study, the semi-structured approach enabled the experiences, perspectives and plans of different stakeholders to be brought to light in the context of change

management. The method was well suited to this study, as it provided sufficient structure to address the themes being compared, but also the flexibility to respond to themes that emerged on a case-by-case basis.

3.2 Interview analysis

In this study, the interview data were analyzed using thematic analysis (TA), a versatile and widely applied qualitative research method. TA enables the identification, processing and interpretation of recurring meaningful factors, or themes, in the data (Clarke & Braun, 2016; Nowell et al., 2017). Clarke and Braun (2016) emphasize that TA is a method, not a methodology – it is not tied to a specific theoretical framework but can be applied in different research paradigms. TA offers the researcher a forward-looking but systematic way to analyze qualitative data and build meaningful interpretations from it. It can also be used to examine the linguistic or social meanings of participants.

Nowell et al. (2017) reminds that the use of TA also requires methodological care and transparency in order to ensure the credibility and traceability of the analysis. They emphasize the importance of documenting the analysis steps, presenting the justifications for the analysis, and utilizing the so-called audit trail procedure so that the reader can assess the reliability of the analysis. Thematic analysis can be carried out both inductively (data-driven) and deductively (theory-driven). In this study, the approach is partly deductive, as the analysis is guided by a literature-based model of change management, but at the same time it also allows for the consideration of phenomena emerging from the data.

The analysis process consists of six interrelated stages. In the first stage, the data is studied by carefully studying it: the interviews are transcribed and read several times so that the researcher can internalize the whole. In this stage, preliminary observations can be made, and interpretive ideas can be recorded. After this, meaningful expressions are identified in the data and given codes. The codes can be simple identifiers related to, for example, an activity, an experience or a concept. In the next stage, the codes are grouped

into broader themes that represent recurring meaning structures. A theme can consist of several interrelated codes and describe something essential to the research question. (Clarke & Braunin, 2006; 2017).

Once the initial themes have been formed, their content is examined in relation to the entire data. Themes can be combined, divided or rejected. The aim is to ensure that the themes are coherent in content and clearly distinguishable from each other. After this, the themes are named and defined: each theme is given a name that summarizes its core meaning, and the themes are written out in an analytical form, often illustrated with examples from the data. Finally, an analysis chapter is written, in which the themes are presented as part of a narrative whole. The presentation is logical and plausible, and it includes both description and interpretation. (Clarke & Braun, 2006; 2016).

Nowell et al. (2017) emphasize that the reliability of research can be ensured by following the criteria: credibility, transferability, dependability and confirmability. These can be supported, for example, by keeping a research diary, a detailed description of the analysis process, teamwork and, if necessary, feedback from participants (member checking).

The flexibility of TA makes it particularly useful in change management context, where the data can be ambiguous, and the phenomenon being studied is complex. At the same time, its systematic nature allows for the transparency and credibility of the analysis to be ensured.

3.3 Research process overview

The research process proceeded in four main stages, which form a logical body for examining and answering the research question. In the first stage, a literature review was carried out, and based on that, a general change management model was built. The model was formed by examining key change management theories and scientific publications, and it served as an analytical framework for the entire study. After this, empirical data was collected through semi-structured interviews with people participating in the

CRM change project of the case organization. The interviewees represented different roles and perspectives within the organization, which enabled a diverse understanding of the planning and implementation of the change. After this, the interviews were transcribed and analyzed using the thematic analysis method. The thematic analysis was carried out mostly deductively, using the six-phase change management model developed in the study as the framework for the analysis. The final stage combined empirical findings with a theoretical framework to assess the extent to which the case organization's change management practices corresponded to good practices identified in light of previous research and theory. This structure was used to ensure transparency, replicability, and a consistent progression from analysis to synthesis (Yin, 2014). Figure 7 presents the visualization of the research process overview.

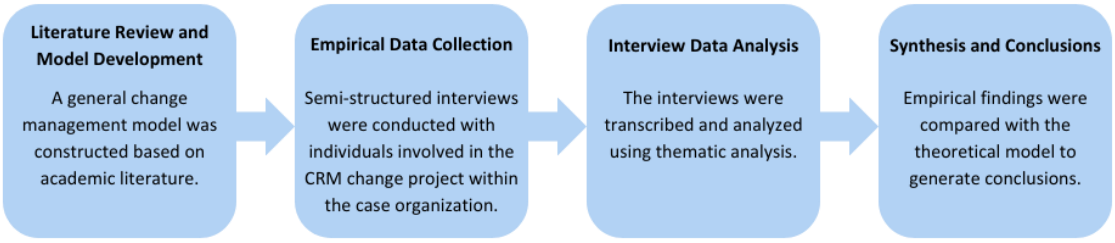

Figure 7. Visualization of the research process overview.

4 Findings

This chapter presents the findings from the interviews on the case organization's change management plans for the CRM system upgrade. The results are grouped by theme according to the stages of the theory-based change management model. This allows for a systematic comparison between the previously presented model and the practical implementation.

Chapter 4.1 describes the empirical context of the study, the background of the case organization, the roles of the interviewees and the implementation of the interviews. This provides the reader with an understanding of the practical environment in which the change management findings are situated.

4.1 Research setting

This study first started in spring 2024 after the organization presented the need to study their change management during CRM system upgrade. Based on the interviews conducted, their marketing and sales teams are most affected by this change. Initially, the aim was to study how the organization's change management would impact the success of the CRM system upgrade. Later, the goal of the study was changed to make a general change management model to compare with the change management plans of the organization to find out if they are missing some key elements of the change management. Thus, they could adapt these missing elements to their change management plans and help them carry through the change more successfully in the future. The organization operates in the field of electronic financial management software industry.

To conduct the interviews, suitable people needed to be identified. This was done by the contact person of the organization. This survey identified three individuals who were thus selected for interview. Interviewee 1 was a sales workstream leader, acting as a liaison between the sales organization and the project team and was responsible for the development of sales processes during the change. Interviewee 2 was working in the

role of Director of Business Solutions, as the person responsible for the overall architecture, participates in project management and leads change management. They have also been involved in strategy work, communications and supporting various working groups. Their role is both operational and strategic, and they act as a project "bridge builder" between technical and business needs. Interviewee 3 acted as the strategic leader of the CRM project and the initiator of the change project, responsible for the project's vision, resourcing, and overall direction of change management. Interviews were conducted by remote meetings and all of them lasted an hour to hour and a half. The goal of the interview was to just have a flowing conversation on this subject, but there was some kind of structure and supportive questions that were asked to clarify essential issues. This interview body is attached as appendix 1.

To ensure the transparency of the analysis process (audit trail), the interviews were transcribed, and the transcripts were checked after the interviews to ensure the integrity of the data. The data were reviewed in several stages: the interviews were read through several times to form a clear overall picture, and any preliminary observations were recorded. Significant expressions were coded openly using short identifiers describing the content of the expressions. Themes were formed from the codes by combining similar or related codes. Summaries of the interviews were also checked by the interviewees to ensure everything was correct.

4.2 Findings of the interviews by themes

The analysis was based on a general model of change management based on the literature, and based on that, the initial structure of the themes was defined mostly deductively. This chapter focuses on presenting the content of the themes as they emerge from the experiences and views of the interviewees. The actual comparison with the theoretical model is made in Chapter 5. The following table (2) presents the themes identified from the interviews.

Table 2. Identified themes from the interviews.

Theme	**Description**
1. Vision for change and definition of goals	How the need for change and the vision have been defined and communicated.
2. Roles and responsibilities of change management	Definition of responsible persons and participation of management.
3. Employee involvement and commitment	Involvement of employees in different stages of the change.
4. Communication to support change	Communication planning and used channels.
5. Training and deployment preparations	Training of employees and development of competence before the system implementation.
6. Identified risks and challenges	Threats related to the change and their management.
7. Monitoring the change	Measuring the progress and effects of the change.
8. Reflection and lessons learned	Things learned from the project and areas for development for future changes.

In theme 1, **Vision for change and definition of goals**, according to the interviews, the vision for the CRM system change in the case organization was defined quite clearly and early on at the management level. Interviewee 3 described the vision as being strong and strategically well-defined in the initial phase, creating a good foundation for the entire project. However, they noted that the communication of the vision to top management, and to the lower levels of the organization was lacking, which resulted in the vision's meaning not remaining clear as the project progressed. According to interviewee 2, the vision was clear and widely accepted in the project team, but its communication and explanation of its meaning to the entire staff remained superficial. Interviewee 1 confirmed that the vision was inspiring in the initial phase, but delays and the project's

extension led to its value being faded among the employees. The interviewees widely recognized that more effective and consistent communication related to the vision would have been important for the success of the project.

In theme 2, **Roles and responsibilities of change management**, the shortcomings in defining roles and responsibilities in change management were highlighted in all interviews. Interviewee 3 stated directly that there was no clearly designated change manager in the project, but that responsibilities were distributed to different people (workstream leaders) and their units, which made centralized and effective change management difficult. They also emphasized that people who were responsible for change management in their workstreams were not trained for change management, so it all relied on their possible experiences in the past. Interviewee 2 explained that change management responsibilities were given to the core project team, which confirms interviewee 3's concerns of inconsistency in change management. Interviewee 1 described the role of workstream leader as being given responsibility for implementing the change in practice without sufficient coaching or support to change management. This may lead to change management being neither comprehensive nor consistent across the different phases of the project.

In theme 3, **Employee involvement and commitment**, the interviews showed that the employee involvement was planned to be mainly led by workstream leaders, whose responsibility was initially to collect business requirements and later feedback on the change from the employees throughout the change process. According to interviewee 3, the problems with involvement and commitment in the marketing workstream were accentuated due to personnel changes, which made it difficult for employees to participate and commit to the change. Interviewees 2 and 3 also mentioned that there was going to be an user acceptance testing (UAT), in which the first users of the new CRM system will be attending and provide feedback on the new system. Interviewee 2 emphasized that the UAT kickoff meeting was held on-site at the office to enforce the commitment to the change by the users. Interviewee 1 highlighted that although the initial involvement was

active and successful, constant delays and unclear communication caused a decrease in motivation and passivity among staff. Based on the interviews, it is clear that there were plans to involve employees throughout the change process, but it was not as clearly planned as it could be, and this could cause uncertainty regarding commitment.

In theme 4, **Communication to support change**, communication was identified in the interviews as one of the most critical issues in the change project. The interviews revealed that communication channels such as SharePoint and newsletters were in use, but their effectiveness was limited. According to interviewee 3, communication was too one-way and sporadic, which limited the opportunities for employees to ask questions or provide feedback in the early stages. They stated that there were plans to increase communication closer to implementation of the system, through emails and superiors. Interviewee 2, on the other hand, stated that the use of communication channels was not targeted enough, which resulted in not all units receiving the necessary information in a timely manner. They also confirmed interviewee 3's statement about plans to increase communication closer to implementation of the system. Interviewee 1 reported that they held weekly sales team meetings, but did not mention that they were in any way systematic. They also confirmed Interviewee 3's claim that organization-wide communication was too sporadic.

In theme 5, **Training and deployment preparations**, which focuses on training and deployment preparations, all interviewees mentioned that the organization had adopted a "train-the-trainer" model, in which selected key personnel will receive in-depth training in the system and be responsible for training employees in their own units. This model was seen as efficient from a resource perspective, although, according to the interviewees, its implementation varied between different units. Interviewee 3 highlighted the uneven implementation of the model between units, due to the different training needs. Interviewee 2 also highlighted a clearly defined "hypercare" phase, during which users were offered enhanced support to resolve problems identified during the system implementation and to embed the change into the organization's everyday life. After this,

system maintenance and user support will be moving to a normal operational model, in which the main user service responds to questions and problems from users.

In theme 6, **Identified risks and challenges**, several key risks were identified in the interviews, such as lack of resources, overloading of key personnel and prolongation of the change schedule. Interviewee 3 particularly emphasized the dependence on a few key personnel and the delay in implementation as risks. Interviewee 2 emphasized the quality of data and the lack of resources, which threatened the implementation of the change in practice. Interviewee 1 strongly highlighted the decrease in personnel motivation and uncertainty, which were due to changes in the change schedule and continuous ambiguities as the project progressed.

In theme 7, **Monitoring the change**, according to the interviews, the monitoring and implementation of the CRM system change was initially unclear, and it was seen as a key development area in the project. All interviewees emphasized that in the early stages, the progress of the project was not sufficiently transparent, and the monitoring was not systematic. According to interviewees 2 and 3, this shortcoming also led to the change of project manager and the creation of clearer monitoring and reporting structures. According to the interviewees, the monitoring of the change was later carried out closely through weekly meetings between the workstream leaders and other project team members. Workstream leaders also held weekly meetings with their workstreams. The interviewees stated that this significantly improved the transparency and monitoring of the project. Interviewee 3 however stated that the organization does not have sufficient capacity to measure the success of the change after the actual implementation. They mentioned that monitoring was limited in practice to how well process-related issues were being implemented based on the figures from the sales, marketing and contract processing information systems. They also emphasized that the responsibility for monitoring should be transferred to business managers, and this had not been sufficiently considered in the planning. Interviewee 2 stated that the indicators of the success of the change include staying on schedule, completion of delivered outputs, cost tracking, and

user satisfaction and training feedback. Based on these responses, it can be interpreted that some measures to measure the impact of the change had been initiated in the organization, but their scope and ownership were unclear. Interviewees 2 and 3 views together indicate that monitoring remained somewhat fragmented and focused mainly on short-term project performance, rather than long-term organizational change.

In theme 8, **Reflection and lessons learned**, all the interviewees openly reflected on the lessons learned during the project. All interviewees emphasized the positive effects of the change of project manager on leadership. Interviewee 3 highlighted the need to develop change management skills and clarify the division of responsibilities in future projects. Interviewee 1 particularly highlighted the need to clarify roles and project management in order to avoid similar challenges in the future.

In summary, several observations emerged from the interviews related to the planning and implementation of the CRM system change in the case organization. The change vision was perceived to be strong and clear in the initial stages of the project, especially within the project team, but its communication to the wider organization was lacking, according to the interviewees. This led to the vision's meaning becoming blurred as the project progressed and its impact on the personnel weakening. All interviewees highlighted ambiguities in the division of responsibilities for change management. No separate change manager had been appointed, but responsibilities had been distributed to different work streams without clear coordination or sufficient change management training. Involving personnel was the responsibility of the work stream leaders, but its implementation varied by unit. Involving employees in the marketing work stream was particularly hampered by personnel changes, and according to the interviewees, constant delays and unclear communication throughout the organization affected personnel motivation and commitment. Regarding communication, it was found that the channels used, such as SharePoint and newsletters, did not reach all units effectively, and communication was mainly one-way and sporadic. The training utilized a "train-the-trainer" model, which was considered resource-efficient, but its practical implementation varied

between different units. A so-called hypercare phase was planned to support the implementation, during which users were offered enhanced support. Interviewees identified several risks, such as overloading key personnel, resource shortages, and extended project schedules. Monitoring and measuring progress in the initial phase of the change was felt to be unclear and insufficient, but it improved as the project progressed through weekly meetings. However, no clear model had been created for assessing long-term impacts, and no plans were made to transfer monitoring responsibility to business management. Interviewees also highlighted lessons learned and development suggestions that emerged during the project. The need to develop change management skills, clarify roles and responsibilities, and improve communication in the future was particularly highlighted.

5 Results

The interviews revealed that change management of the CRM system upgrade of the case organization was planned to be implemented through several complementary phases and elements. This chapter answers research questions 2 and 3 by examining the case organization's change management plans based on interviews and comparing them to the previously developed model.

5.1 Change management plans in the case organization

Based on the interviews, the need for change and the vision for change had been defined clearly and sufficiently early by the project team in the case organization. This supports the first stage of Kotter's (1996) model, which emphasizes the importance of a clear need for change and vision for the success of change. The vision aimed to improve the usability of the system, increase efficiency and harmonize processes throughout the organization, which is in line with the strategy and systems factors of McKinsey's 7S framework (Waterman, Peters & Phillips, 1980). However, interviews showed that the strategic vision was clearly communicated only to the project team, and the communication to all employees was not that successful and it was not made as early as possible to achieve a common understanding of the need for change and goals.

The project implementation utilized a workstream model, in which different areas of responsibility, such as sales, marketing and IT, had been defined for their own responsible persons. Although the project manager was responsible for general coordination, no separate change manager had been named in the original plan. Instead, responsibility for change management was divided between the leaders of the different workstreams and the project team members. This solution is partly in conflict with Kotter's (1996) model, which emphasizes the need for a strong change steering group, and McKinsey's 7S framework (Waterman et al., 1980) on the importance of personnel and management factors in defining clear responsibilities.

The communication implementation was planned to be mainly one-way, using channels such as SharePoint, newsletters and intranet. The only two-way communication possibility was the meetings between the workstream leaders and their units, but they were not planned or consistent across all workstreams. The aim of the communication was to provide regular information about the progress and schedules of the project and to answer the most common questions using pre-prepared communication materials. However, this communication implementation does not sufficiently emphasize the two-way communication and continuous dialogue with the personnel according to the Kotter (1996) model, which would also be important for the awareness and knowledge phases of the ADKAR model (Hiatt, 2006).

The involvement of the personnel in the change was planned especially in the early phase of the project, during the definition of business requirements. For example, the sales team actively participated, and their views were considered. The purpose of the involvement was to ensure the personnel's understanding of the reasons and objectives of the change, and to identify the concerns and special needs of the units. In later stages, workstream leaders were responsible for the involvement of the employees. This created a risk that workstream leaders who were not used to being change management leaders might not have involved employees enough. However, before the implementation of the new system, there were plans to execute an user acceptance testing (UAT) to collect feedback from the first users and commit them to the change. This is somehow aligned with the change phase of Lewin's (1947) change management model, which emphasizes the importance of continuous involvement and influence for the success of change.

The training and preparation for implementation were structured according to the train-the-trainer model, where key personnel are trained first and are then responsible for implementing the training in their own units. The model was chosen for its resource efficiency and local applicability. According to the plan, the training will be implemented

in stages and considering the specific needs of the units, which supports the knowledge and ability dimensions of the ADKAR model (Hiatt, 2006), enabling the training needs of the personnel to be considered as effectively as possible.

For post-implementation support, a short-term, enhanced support, so-called hypercare phase was planned, in which the organization monitors the use of the system and reacts to any problems immediately. The purpose of this phase was to ensure a smooth implementation of the system and minimize problems arising from the implementation. However, the plan did not specify long-term monitoring or practices for consolidating change, which is inconsistent with Lewin's (1947) freezing phase and Kotter's (1996) final stages that emphasize consolidating the change.

In summary, the case organization’s initial change management plans were based on a strong initial vision, clear division of responsibilities through workstreams, one-way communication, and targeted but limited employee involvement and training. The key objective of the plans was to enable a controlled and smooth CRM system upgrade across different organizational areas and ensure the smoothest possible implementation of the system, although the lack of some critical elements, such as long-term monitoring and active two-way communication, may pose challenges to the long-term success of the change. Figure 8 visualizes case organization’s change management model built based on the interviews.

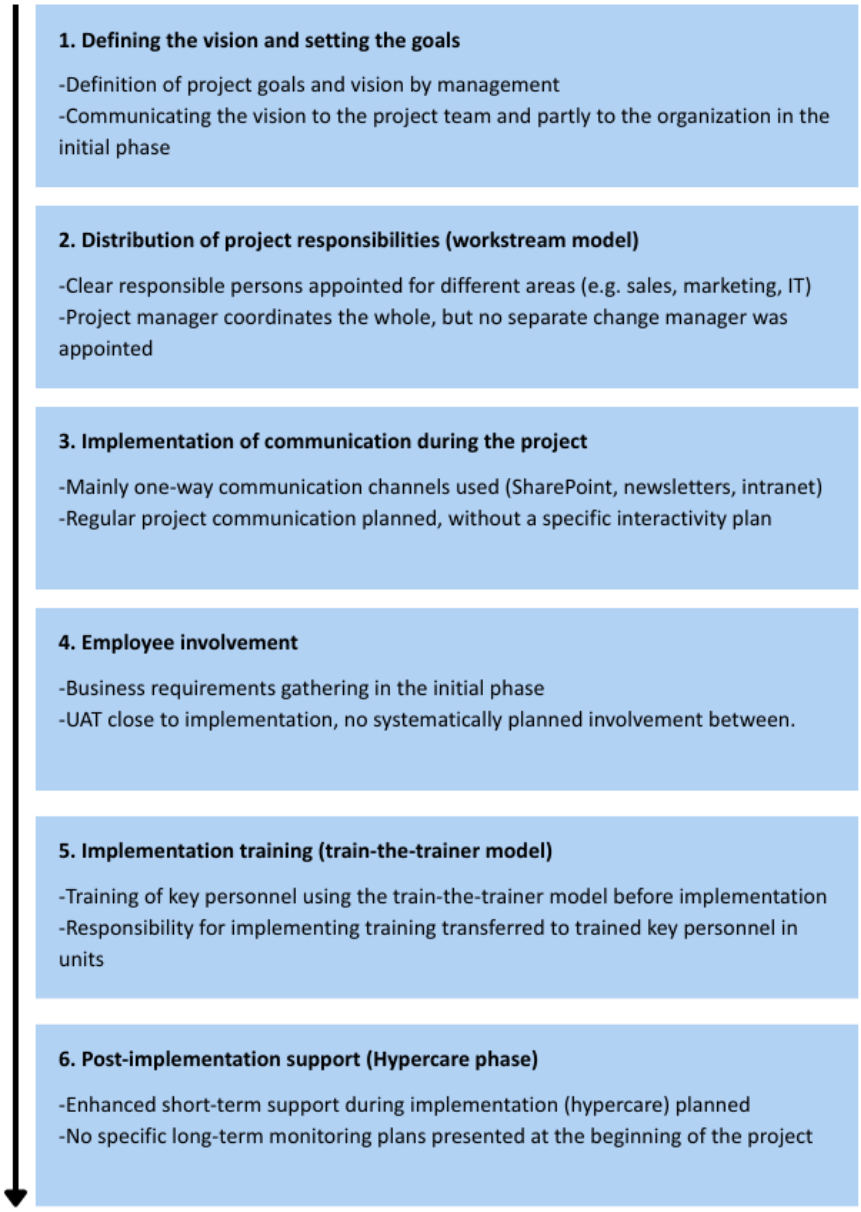

Figure 8. Change management model of the case organization based on the interviews.

5.2 Comparison between theoretical model and case organization's change management plans

This section compares the change management plans for the CRM system upgrade of the case organization with a literature-based change management model. The six phases of the theory-based model are used as the basis for the comparison: (1) Identifying the

need for change and vision, (2) Commitment and role assignment of management, (3) Communication and employee engagement, (4) Competence development and training, (5) Implementation and monitoring of change, and (6) Consolidation and evaluation. Table 3 shows the comparison simplified.

Table 3. Comparison of Theoretical Model Vs. Case Organization.

Phase	Theoretical Model	Case Organization	Matching
1.	Vision should be concrete, well-communicated, and based on shared values and long-term goals.	Vision clearly defined for project team, communicated one-way, not clearly linked to shared values.	Partial match
2.	Requires clear change leadership, documented responsibilities, management commitment, and role modeling.	No designated change leader, responsibilities were decentralized and unclear, limited managerial visibility and example.	Weak match
3.	Emphasizes open, two-way, proactive, and continuous communication with active employee participation.	Mostly one-way communication: employee involvement limited to early stages, lack of structured feedback mechanisms.	Weak match
4.	Supports unit-specific training and long-term competence development as part of strategic staff development.	Unit-specific training exists and meets immediate needs but lacks long-term training strategy.	Strongly (initial); Weakly (long-term)
5.	Highlights systematic monitoring, clear roles, early wins, and responsiveness to emerging issues.	Weekly monitoring meetings and hypercare included, aligns with transparency and reactivity.	Strong match
6.	Calls for embedding change in organizational culture, structures, leadership behavior, and continuous monitoring.	Some tracking measures exist, but focus is on project metrics, no systematic transfer of responsibility or cultural integration.	Weak match

In defining the need for change and vision, the case organization's operating methods partially correspond to the theoretical model. In the organization, top management

clearly defines the need for change and the vision, which supports the importance of a concrete and clearly communicated vision emphasized by Kotter (1996) and Lewin (1947). However, in the case organization, the vision is clearly defined only for the core project team and mainly communicated to the personnel in a one-way manner and understanding or commitment to the vision is not systematically monitored as the project progresses. The theoretical model emphasizes the importance of continuous communication of the vision to strengthen employee commitment (Hiatt, 2006; Kotter, 1996). Therefore, the depth and continuity of vision communication in the case organization should be developed. Furthermore, the vision of the case organization does not seem to be based on the organization's shared values and long-term goals to the extent that the theoretical model recommends. Or at least this did not emerge from the interviews. According to the shared values dimension of the 7S framework, the vision for change should be built on the organization's identity and core values, so that the change is strategically coherently linked to the organization's operations and has long-term significance for it (Waterman et al., 1980).

Significant differences are observed in the commitment of management and the definition of responsibilities compared to the theoretical model. In the case organization, the responsibilities for change management were divided between the leaders of different workstreams and the project manager without the appointment of a clear change manager. Workstream leaders also did not receive any change management training even though they were partly responsible for the change management. Based on the interviews, the responsibilities for change management are partly unclear and decentralized, which can lead to inconsistent approaches and slow down decision-making and change implementation. In addition, the interaction style of management and operational example set by management was lacking at some extent. The visibility and operational example set by management should be a clear part of the change management in order to strengthen the trust and commitment of the personnel. Therefore, this approach does not fully correspond to Kotter's (1996) idea of a clearly defined and visible steering group or the requirement of the McKinsey 7S framework (Waterman et al., 1980) for

documented and communicated responsibilities as well as operational example set by management.

Communication and employee engagement are one of the biggest development areas in the case organization's change management plans compared to the theoretical model. According to the theoretical model, communication should be open, two-way, proactive and continuous, which enables employees to be involved and play an active role in the planning and implementation of change (Kotter, 1996; Hiatt, 2006; Waterman et al., 1980). In the case organization, communication is designed to be mostly one-way. Employees are mainly involved only in the initial collection of business requirements, but after that, continuous involvement was dependent on the workstream leaders and their ability to actively involve the employees. Between the time of gathering the business requirements and UAT, which was organized close to the implementation of the new system, there were no other proper feedback channels for the employees than the meetings between the workstream leaders and their units. If the workstream leaders were not proactive to gather the feedback, there is a risk that that could increase uncertainty and resistance to change and reduce employee commitment to the goals of the change.

The competence development and training in the case organization are very close to the theory, especially from the perspectives of the ADKAR model (Hiatt, 2006) and McKinsey's 7S framework (Waterman et al., 1980). The train-the-trainer model chosen by the organization and the unit-specific tailored training meet the requirements of the theory-based model. However, the perspectives of continuous training and long-term competence development, which are emphasized by the theory, are missing from the case organization's plans, which may weaken the ability of the personnel to utilize the new system effectively in the long term.

According to the theoretical model, implementing change requires systematic progression, clear roles, continuous monitoring, and responding to perceived challenges (Kotter, 1996; Lewin, 1947). The model also emphasizes the importance and visibility of early

successes so that the change is perceived as a meaningful and progressive process (Kotter, 1996). Based on the interviews, the weekly monitoring meetings between workstream leaders and within their units significantly improved transparency and enabled the monitoring of the project's progress. This practice corresponds to the continuous and transparent monitoring and interactive management emphasized in theoretical model during implementation. The case organization’s plans also include a hypercare phase, during which the implementation will be supported in an enhanced manner, which corresponds to the theoretical model’s early response to problems and user support.

According to the theoretical model, the consolidation of change and continuous development are essential decision stages, the aim of which is to embed new ways of working as permanent parts of the organization’s culture and structures. Long-term monitoring, measuring the effects of change and the commitment of business management as well as long-term staff development are critical prerequisites for ensuring that the results achieved do not remain temporary, but become a part of daily operations. (Lewin, 1947; Kotter, 1996; Waterman et al., 1980). However, the original plans of the case organization did not present clear structures or practices that would systematically ensure the long-term monitoring and consolidation of change. Based on the interviews, the organization had initiated some measures to measure the effects of change, such as monitoring schedules, outputs and user feedback, but these indicators mainly focused on project performance. In addition, the responsibilities for continuous monitoring and development appeared unclear. In particular, the transfer of long-term monitoring responsibilities from the project organization to business management was not adequately addressed in the plans, which is inconsistent with the requirements of the theoretical model (Kotter, 1996; Hiatt, 2006). Thus, it can be stated that although the organization had taken some steps towards assessing the effects of the change, the plans did not fully correspond to the systematic implementation of consolidation and continuous development required by the theoretical model. This may pose a risk to the sustainability of the change and its integration into the organization's everyday life.

In summary, the change management plans of the case organization partially correspond to the theoretical model, but contain clear areas for improvement, especially in the role of management, communication, employee engagement and long-term embedding of the change. While the need and vision for change is clearly defined for the project team, communication to the wider staff has been mainly one-way, with no systematic monitoring of understanding or commitment. Management commitment has remained weak in visibility, and no clear person responsible for change management has been appointed, which may lead to the dispersion of responsibilities and partly unclear implementation. Employee involvement has been concentrated in the early stages of the project, with insufficient feedback channels in place between planning and implementation. In terms of training, the organization has implemented targeted measures for each unit, but there is a lack of a long-term skills development perspective. Although monitoring and response during the implementation phase of the project has been active and well organized, for example through weekly meetings and the hypercare phase, the structures and responsibilities related to the consolidation of the change have not been planned. Long-term monitoring of the effects and incorporating the change into the organization's culture and operations would require clearer structures and mechanisms that support continuity. This overall picture shows that although many practices support the implementation of the change, the plans could be strengthened, especially in terms of strategic alignment, inclusiveness and the sustainability of the change.

6 Concluding Remarks

The aim of this thesis was to build a general change management model based on previously scientifically studied change management models and then compare it with the case organization's change management plans in their CRM system change. Thus, the new change management model must also be suitable for, for example, updating the CRM system. The new change management model was built based on four general change management models and theories. These four models and theories were Lewin's 3-phase change management model, Kotter's 8-phase change management model, Hiatt's ADKAR model and McKinsey's 7S theory. In building the model, previous theory about these models and theories was introduced, considering the criticisms and strengths of them. After this, the case organization’s change management plans were investigated through interviews, which were analyzed by theme analysis, and with their help, a kind of change management model was formed. Finally, the change management model based on the theory was compared with the case organization's change management plans.

6.1 Key research results

The research objectives of this thesis were met in the work. The first research question, *what does a general change management model look like based on previous scientific research*, was answered in Chapter 2 by building a general change management model based on theory. The second research question, *what does the case organization's change management plans look like in their CRM system upgrade*, was answered by analyzing the interview data thematically in Chapter 4 and building the change management model they used from these plans in Chapter 5. The third research question, *what are the differences between the theory-based change management model and the case organization's change management plans*, was answered in Chapter 5 when change management in the case organization was compared to the theory-based change management model. With these, the research objectives were achieved in full during the work.

The results showed that the case organization's change management plan corresponded to the theory-based change management model in several areas, but some differences were also found. Similarities were observed, for example, in the clear definition of the vision, staff training, and monitoring of implementation. Differences or shortcomings were, for example, in the broader communication of the vision, improved and two-way communication between the project team and employees, the definition of change management responsibilities, and longer-term monitoring.

6.2 Research contribution to science

The results of this thesis show that the change management model developed in this work responds in many ways to the findings and challenges presented in previous research. Previous studies have repeatedly criticized well-known change management models – such as the Lewin, Kotter and ADKAR models – for their excessive linearity and lack of context awareness (Stouten et al., 2018; Cummings et al., 2016). In these models, change is assumed to proceed sequentially from one stage to another, although in reality organizational changes often occur in parallel, retrospective and iterative ways. The model developed in this thesis takes this critical perspective into account by providing a structurally clear but at the same time practically adaptable model that can adapt to agile development and a constantly changing operating environment.

Stouten et al. (2018) also emphasize that there is no scientific consensus on best practices in change management, and that more empirical research is needed on how different models can be combined and adapted to different contexts. This thesis responds to this need from a theoretical perspective by bringing together key elements of four widely known change management models into a single conceptual model. The model does not aim to provide a universal solution, but rather a model that can be applied to the specificities of different organizations and types of change. Although the model is built through a literature-based synthesis, its practical relevance is illustrated by utilizing it as an analytical framework in examining the change management plans of a case organization regarding a CRM system upgrade. In this respect, this thesis contributes to the

discussion that emphasizes the context-specificity of change management and the connection of theory to practical organizational realities (By, 2005; Al-Haddad & Kotnour, 2015).

Furthermore, this thesis supports the idea put forward by Rivard and Lapointe (2012) that resistance to change is not an unambiguously negative phenomenon but can serve as an indicator of shortcomings in the planning or implementation of change. The challenges raised in the case study regarding employee engagement and communication are in line with previous research, which emphasizes the interactivity of communication and understanding of users' experiences in successful system change. The empirical part does not evaluate the functionality of the model itself but rather uses the model as a tool to identify strengths and areas for development in the organization's change management plans.

In summary, this thesis responds to the development needs identified in previous literature and presents a new theoretical model that combines insights from multiple frameworks into a coherent and adaptable whole. Applying the model as a tool for analysis contributes to the current debate on how change management should be structured and led in complex, technology-driven organizational contexts.

6.3 Contribution of research in practice

The practical significance of this thesis lies in the fact that it offers a new theory-based change management model that should be applicable, for example, in the CRM system upgrade process. The results of this thesis are of particular benefit not only to the case organization under review but also to other companies in a similar situation that are implementing or planning a customer relationship management system upgrade. From the perspective of the case organization, this thesis provides a systematic and theory-based analysis of the current state of its change management. This enables the identification of concrete development targets and a substantiated basis for the further development of change management practices. The organization can utilize the results of this

thesis by planning future projects more consistently than before, especially in the areas of management responsibility, communication, employee engagement and change implementation.

Other similar organizations can, in turn, utilize the general change management model developed in this thesis to support CRM system changes. The model combines the strengths of several of the best-known change management theories and considers the challenges inherent in technology projects, such as system dependencies and a multi-actor environment. The model serves as a practical framework for organizations to assess their own change management capabilities, plan interventions, and develop long-term change capacity. In addition, this thesis provides an example of how a theory-based model can be used as a framework to analyze and identify development areas in practical change management planning, which may encourage other organizations to document and reflect on their own change processes in the same way.

In this way, this thesis not only examines a single project but also contributes to a more general understanding of how change management can be systematized and improved in the context of digital system upgrades. The results of the research show that the success of change management is not just a question of project management, but requires a broad consideration of the culture, structures and interaction of the organization. In this respect, the research also contributes to the development of the knowledge base of change management.

6.4 Practical recommendations for the case organization

Based on this thesis, several concrete practical recommendations can be presented to the case organization that support the development of change management in future system upgrades. These recommendations are based on a comparison between the case organization’s plans and the theory-based model. First, it would be advisable to appoint a separate, project-wide change management person or team who will coordinate change management consistently throughout the different phases of the project. Such a

centralized role would improve the management of the overall picture of the change and strengthen the continuity of the change process beyond the boundaries of individual work streams.

Second, communication planning and implementation should be invested much more systematically than is currently the case. The organization should move from one-way information to an interactive communication model that enables active participation of personnel, asking questions and addressing concerns in real time. In particular, it would be good to plan the scheduling and frequency of communication in advance so that communication is not only emphasized as implementation approaches but is consistent throughout the change.

Another recommendation is to expand and start employee engagement earlier. Simply involving employees in business requirements gathering or testing during the implementation phase is not enough to build commitment. The organization should build an engagement model that covers all stages of the change process and supports employees' experience so that their views have an impact on the outcome. Special attention should also be paid to ensure that engagement responsibilities are clearly defined and that those responsible receive the necessary support for change management tasks.

In addition, the training plan should be supplemented with a long-term competency development model. In addition to the train-the-trainer approach, the organization should plan how to maintain and develop system usage skills after implementation. This could include, for example, ongoing learning modules, usage support materials, and regular competency assessments.

Finally, it is important to establish metrics and accountability arrangements for assessing and continuously monitoring the impact of the change early in the project. These can help ensure that the impact of the change is not only assessed from the perspective of project success, but also how well the change has become part of the organization's

everyday life and operating culture. The transfer of responsibility for monitoring to business units after the project has ended should be implemented in a controlled and planned manner. With these measures, the case organization could strengthen its ability to change and improve its readiness to face future system upgrades in a more systematic and inclusive manner.

6.5 Research limitations

However, this thesis had its limitations. First, the change management model developed in this thesis was not tested or validated in practice but was used only as a theoretical framework for examining the change management plans of the case organization. Therefore, no conclusions can be drawn about the functionality or applicability of the model in practical situations. The practical benefits it provides are based on only one project in one organization and may not be applicable to all organizations. The empirical research data was also based on interviews with only three people, all of whom were part of the project team, which may affect the criticality of the responses. In addition, this thesis was conducted before the change took place in the case organization, so the real effects of change management cannot yet be seen or assessed. Despite these limitations, this thesis produces a theoretically structured understanding of change management modeling as well as case-based observations of the practical challenges of change management planning in a technology-driven context.

6.6 Follow-up measures and future research topics

In the future, the research should be expanded with a longitudinal design, in which the same organization is also examined in the post-change phase. This would allow us to assess how well the plans were implemented and what kind of effects the change had from the perspective of personnel, customers and business. In addition, the applicability of the model could be examined by comparing its use in different organizational cultures, industries and types of change. It would be important to expand the empirical data quantitatively and qualitatively, for example by increasing the number of interviewees and

the diversity of roles. The experiences of personnel could also be mapped using surveys or focus group interviews. Such an approach would deepen the understanding of how change is experienced in the organization and how commitment to change is built in practice.

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Appendices

Appendix 1. Interview Body

1. Taustakysymykset

-Kerro lyhyesti Nova projektista omasta näkökulmastasi?
-Voisitko kertoa lyhyesti roolistasi ja vastuistasi CRM-järjestelmän päivitysprojektissa?
-Miten koet oman roolisi muutoksen toteuttamisessa?
-Miten kuvailisit organisaation lähtötilannetta ennen CRM-päivitystä?
-Mitkä tekijät vaikuttivat päätökseen päivittää CRM-järjestelmä?

2. Muutoksen valmistelu

Tukikysymykset:

- Miten muutoksen tarve havaittiin ja miten se on perusteltu organisaation sisällä?
- Onko muutoksella selvä visio? – onko siitä viestitty?
- Millä tavoin muutos on viestitty henkilöstölle tähän mennessä?
- Miten henkilöstö on reagoimassa muutokseen tässä vaiheessa?
- Onko organisaatio nimennyt erillisen tiimin tai vastuuhenkilöt muutoksen johtamiseen?
- Millaisia strategioita tai toimintasuunnitelmia on jo laadittu muutoksen läpiviennille?
- Millä tavalla henkilöstöä on osallistettu muutoksen suunnitteluun ja päätöksentekoon?
- Mitkä ovat suurimmat odotukset ja tavoitteet muutoksen onnistumiselle?
- Oletteko tunnistaneet jo mahdollisia haasteita tai esteitä, ja jos kyllä, miten olette varautuneet niihin?

3. Muutoksen suunnittelu ja käynnistäminen

Tukikysymykset:

- Mitä konkreettisia toimenpiteitä on jo tehty muutoksen eteen?
- Miten muutoksen edistymistä seurataan ja arvioidaan?
- Onko suunniteltu tai jo pidetty koulutuksia tai tukitoimia henkilöstölle muutoksen tueksi?
- Miten muutoksen etenemisestä aiotaan viestiä eri organisaatiotasoille?
- Onko organisaatiossa jo jokin tapa kerätä palautetta henkilöstöltä muutoksen alkuvaiheessa?

4. Muutoksen vakiinnuttaminen ja seuranta

Tukikysymykset:

- Onko jo mietitty, miten uusi CRM-järjestelmä saadaan juurtumaan osaksi arjen toimintaa?
- Millä mittareilla arvioitte muutoksen onnistumista tulevaisuudessa?
- Onko organisaation rakenteita, käytäntöjä tai palkitsemismalleja muutettu tukemaan uutta toimintatapaa?
- +Miten aiotte varmistaa, että henkilöstö sitoutuu uuteen järjestelmään pitkällä aikavälillä?
- (Millaisia oppimiskäytäntöjä tai jatkuvan kehittämisen malleja olette suunnitelleet muutoksen tueksi?)

5. Yleinen arviointi ja reflektointi

Tukikysymykset:

- Kun katsot nykyistä muutosprosessia, mitkä asiat ovat olleet selkeimmin suunniteltuja?
- Onko joitain osa-alueita, joihin toivoisit enemmän huomiota?

Appendix 2. Use of AI in this Thesis

Use case of the AI	AI tool used
For checking grammar and possible corrections	ChatGPT and DeepL
For finding useful scientific publications	Elicit and ChatGPT
For reviewing scientific papers	NotebookLM