


**INFLUENCE OF THE CHARACTERISTICS OF SMALL AND MEDIUM FAMILY
BUSINESSES ON CRM IMPLEMENTATION: A CASE STUDY**

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ARTICLE INFO	ABSTRACT
<p>Article history: Received: January, 02nd 2024 Accepted: March, 18th 2024</p>	<p>Purpose: This paper aims to explore the customer relationship management (CRM) strategies adopted by Family Small and Medium Entreprises (SME), while highlighting the impact of their characteristics and their assets on the choice and the adoption of these CRM strategies.</p>
<p>Keywords: CRM Strategies; Relationship Marketing; Family Entrepreneurship; Socio Emotional Wealth; Sustainability; Knowledge Transfer; Case Study.</p>	<p>Methodology: Since the unique case study approach allows in-depth, multi-faceted explorations of complex issues, we opted for it as a research strategy in order to develop a detailed understanding of the problem. Therefore, an in-depth case study was carried out within a small and medium family business in Morocco.</p>
	<p>Findings: Through this study, we have highlighted causal links between the characteristics and specificities of the family SMEs and their impacts on the adoption and implementation of CRM tools and strategies. While some characteristics linked to the nature of family SMEs such as participatory management style, familiness, the desire to transmit the business to future generations and proximity to customers constitute assets for the implementation of CRM, other characteristics, such as the desire to maintain financial independence and recruitment policies that are most often in favor of family members despite their competence, can negatively influence the implementation of successful CRM projects.</p> <p>Implications for Theory and Practice: The results of the present paper allow the authors to draw conclusions that are relevant to both academics and practitioners. As for the theoretical implications, this study highlights the relationship between the characteristics of family SMEs and the choice and implementation of CRM strategies, while relying on their strengths. Furthermore, developing a good understanding of the specificity of CRM adoption and implementation approaches within family SMEs has important managerial implications for family SME decision-makers, as it can help them make better decisions regarding the choice of relevant CRM strategies and to optimize the deployment of available human, financial and technological resources, while relying on their socio-emotional wealth and their motivation to perpetuate the company.</p> <p>Originality: This paper is one of the first to explore CRM strategies adopted by family SMEs. The authors present a conceptual framework that can help researchers and practitioners better understand how the family business nature can influence decisions about CRM tools and strategies implementation.</p> <p>Doi: https://doi.org/10.26668/businessreview/2024.v9i4.4355</p>

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INFLUÊNCIA DAS CARACTERÍSTICAS DE PEQUENAS E MÉDIAS EMPRESAS FAMILIARES NA IMPLEMENTAÇÃO DE CRM: UM ESTUDO DE CASO.**RESUMO**

Objetivo: Este artigo tem como objetivo explorar as estratégias de gerenciamento de relacionamento com o cliente (CRM) adotadas por Pequenas e Médias Empresas Familiares, destacando o impacto de suas características e ativos na escolha e adoção dessas estratégias de CRM.

Metodologia: Dado que a abordagem de estudo de caso único permite explorações aprofundadas e multifacetadas de questões complexas, optamos por ela como estratégia de pesquisa para desenvolver uma compreensão detalhada do problema. Portanto, foi realizado um estudo de caso aprofundado em uma pequena e média empresa familiar no Marrocos.

Resultados: Através deste estudo, destacamos vínculos causais entre as características e especificidades das Pequenas e Médias Empresas Familiares e seus impactos na adoção e implementação de ferramentas e estratégias de CRM. Enquanto algumas características relacionadas à natureza das PMEs familiares, como estilo de gestão participativa, característica familiar, o desejo de transmitir o negócio para as gerações futuras e proximidade com os clientes, constituem ativos para a implementação do CRM, outras características, como o desejo de manter a independência financeira e políticas de recrutamento frequentemente a favor de membros da família, mesmo que competentes, podem influenciar negativamente a implementação de projetos bem-sucedidos de CRM.

Implicações para Teoria e Prática: Os resultados do presente artigo permitem que os autores cheguem a conclusões relevantes tanto para acadêmicos quanto para profissionais. No que diz respeito às implicações teóricas, este estudo destaca a relação entre as características das Pequenas e Médias Empresas Familiares e a escolha e implementação de estratégias de CRM, aproveitando suas forças. Além disso, desenvolver uma boa compreensão da especificidade das abordagens de adoção e implementação de CRM dentro das PMEs familiares tem implicações gerenciais importantes para os tomadores de decisão das pequenas e médias empresas familiares, pois pode ajudá-los a tomar decisões melhores em relação à escolha de estratégias de CRM relevantes e otimizar o uso dos recursos humanos, financeiros e tecnológicos disponíveis, aproveitando sua riqueza socioemocional e sua motivação para perpetuar a empresa.

Originalidade: Este artigo é um dos primeiros a explorar as estratégias de CRM adotadas por Pequenas e Médias Empresas Familiares. Os autores apresentam um quadro conceitual que pode ajudar pesquisadores e profissionais a entender melhor como a natureza do negócio familiar pode influenciar as decisões sobre a implementação de ferramentas e estratégias de CRM.

Palavras-chave: Estratégias de CRM, Marketing de Relacionamento, Empreendedorismo Familiar, Riqueza Socioemocional, Sustentabilidade, Transferência de Conhecimento, Estudo de Caso.

INFLUENCIA DE LAS CARACTERÍSTICAS DE LAS PEQUEÑAS Y MEDIANAS EMPRESAS FAMILIARES EN LA IMPLEMENTACIÓN DE CRM: UN ESTUDIO DE CASO**RESUMEN**

Objetivo: Este artículo tiene como objetivo explorar las estrategias de gestión de relaciones con el cliente (CRM) adoptadas por Pequeñas y Medianas Empresas Familiares (PYME), destacando el impacto de sus características y activos en la elección y adopción de estas estrategias de CRM.

Metodología: Dado que el enfoque de estudio de caso único permite exploraciones profundas y multifacéticas de problemas complejos, optamos por él como estrategia de investigación para desarrollar una comprensión detallada del problema. Por lo tanto, se llevó a cabo un estudio de caso detallado dentro de una pequeña y mediana empresa familiar en Marruecos.

Hallazgos: A través de este estudio, hemos destacado vínculos causales entre las características y especificidades de las PYME familiares y sus impactos en la adopción e implementación de herramientas y estrategias de CRM. Mientras algunas características vinculadas a la naturaleza de las PYME familiares, como el estilo de gestión participativa, la familiaridad, el deseo de transmitir el negocio a las futuras generaciones y la proximidad a los clientes, constituyen activos para la implementación de CRM, otras características, como el deseo de mantener la independencia financiera y políticas de contratación que a menudo están a favor de los miembros de la familia a pesar de su competencia, pueden influir negativamente en la implementación de proyectos exitosos de CRM.

Implicaciones para la Teoría y la Práctica: Los resultados de este artículo permiten a los autores extraer conclusiones relevantes tanto para académicos como para profesionales. En cuanto a las implicaciones teóricas, este estudio destaca la relación entre las características de las PYME familiares y la elección e implementación de estrategias de CRM, apoyándose en sus fortalezas. Además, desarrollar una buena comprensión de la especificidad de los enfoques de adopción e implementación de CRM dentro de las PYME familiares tiene importantes implicaciones gerenciales para los tomadores de decisiones de las PYME familiares, ya que puede ayudarles a

tomar decisiones mejores sobre la elección de estrategias de CRM relevantes y optimizar el despliegue de recursos humanos, financieros y tecnológicos disponibles, aprovechando su riqueza socioemocional y su motivación para perpetuar la empresa.

Originalidad: Este artículo es uno de los primeros en explorar las estrategias de CRM adoptadas por PYME familiares. Los autores presentan un marco conceptual que puede ayudar a investigadores y profesionales a comprender mejor cómo la naturaleza de los negocios familiares puede influir en las decisiones sobre la implementación de herramientas y estrategias de CRM.

Palabras clave: Estrategias CRM, Marketing Relacional, Emprendimiento Familiar, Riqueza Socioemocional, Sostenibilidad, Transferencia de Conocimiento, Estudio de Caso.

1 INTRODUCTION

Nowadays, the environment of small and medium enterprises is in perpetual evolution. The harsh competition requires managers to transform their organizations and their marketing and sales activities and services in order to improve their performance and remain competitive (Supizet, 2002). The battle of any business is to retain its customers and then try to acquire new ones in an aggressively competitive environment that is increasingly characterized by volatile and demanding customers. To do this, SMEs, the main component of all economies around the world (Lizbetinova et al., 2020), deploy a set of strategies and tools that fall under the scope of relationship marketing and CRM to survive in a changing environment. This explains the special attention that has been paid in recent years to CRM within companies, both in the professional and academic world (Bellaaj, 2014). However, it is surprising to note the lack of studies dealing with CRM within SMEs (Ambroise & Prim-Allaz, 2015) and more particularly within family SMEs (Cooper et al., 2005, Arsic et al., 2018), while taking into account their characteristics and assets.

Yet, family SMEs dominate the economic landscape of many countries around the world (Kenyon-Rouvinez and Ward, 2004). Consequently, it is obvious that the analysis of their managerial strategies occupies a preponderant place in the works dealing with this type of organization (Gedajlovic et al., 2012). Thus, a large literature based mainly on the theories of agency (Charlier & Lambert, 2009), stewardship (Le Breton-Miller & Miller, 2009) and social capital (Khalfaoui & Mokhtari, 2017) was mobilized to study and analyze the performances of family businesses. However, few studies have addressed the topic of CRM within family businesses, while taking into account their specificities.

This work is located within this perspective and aims to address the following question: "How do the characteristics and the specificities of the family small and medium enterprises influence the adoption and the implementation of CRM strategies?"

To answer this question, a theoretical and conceptual framework on CRM, its definitions and strategies, will be presented first, followed by a literature review on customer relationship management within family businesses. Note that despite a rich body of literature on CRM and family businesses, no study has addressed the specificity of CRM strategies adopted by family businesses, hence the added value of our research.

In the empirical part, an exploratory qualitative study within a Moroccan family SME was carried out. Results show that the adoption and the implementation of CRM strategies within family SMEs are impacted by the great involvement of the manager and his descendants, the desire to perpetuate the company through the development of a large client portfolio, to keep control and sovereignty of the family by refusing access to third parties to the sphere of top management and the willingness to preserve the financial independence of the firm by refusing the opening of the capital and recourse to debt. All these factors push family SMEs to adopt less expensive and low-risk CRM strategies while seizing the opportunities offered by digital and IT technologies.

2 LITERATURE REVIEW

2.1 CRM FRAMEWORK

In management science, the concept of CRM offers a very interesting framework and field of analysis, given that this concept is located at the intersection of three areas of research, namely: relationship marketing, information systems and strategic management.

However, researchers did not agree with the definition of CRM (Suphan, 2015). The conceptual framework of CRM remains difficult to limit because many definitions have been proposed and are sometimes divergent (Payne & Frow, 2005).

Going back in history, the term "CRM" first appeared in the 1990s in the information technology industry. The term CRM is often used by professionals and consultants to refer to computer applications that enable interactions and relationships between the company and its customers. For this, certain definitions limit the concept to the technological tool. A literature review carried out by (Zablah et al., 2004) shows the existence of 45 definitions all revolving around 4 key elements, namely: Process, Philosophy, Strategy and Technology. The main definitions of CRM are presented in the table 1 below:

Table 1*The main CRM definitions.*

Author	Year	Definition
Parvatiyar & Sheth	2001	CRM is a strategy and an overall process of acquiring, retaining and partnering with selected customers in order to create superior value for the company and the customer. It involves the integration of the organization's marketing, sales, customer service and supply chain functions in order to achieve efficiencies in creating customer value.
Bose	2002	CRM is the essential and vital function of customer-centric marketing to gather and accumulate related information about customers in order to provide effective services.
Piccoli & al.	2003	CRM is an active, participatory and interactive relationship between the company and the client, in order to obtain a global vision of the clients and to be able to anticipate and react in a coherent manner to their needs with targeted and effective activities.
Gartner Inc	2004	CRM is a business strategy with the aim of maximizing profitability and revenues based on customer satisfaction.
Payne & Frow	2005	In a narrow and tactical manner, CRM results in the implementation of a set of specific customer-oriented technological solutions, Broadly and strategically, CRM is a holistic, customer-centric approach that enables value creation for the business and the customer.
Thompson	2007	CRM is a strategy of personalizing products, prices, communication and channels to create a value proposition for the customer. It is a strategy to manage segments, customer service, channels and contacts in order to deliver added value and an enriched customer experience.
Buttle	2009	CRM is a core business strategy that integrates processes, internal functions and external networks in order to create and deliver value to targeted customers while realizing profits. It is based on high-quality customer data and is made possible by IT technologies.
Hung & al	2010	CRM is a comprehensive strategy and process of acquiring, retaining and partnering with selective customers to create superior value for the company and the customer. This involves the integration of the organization's marketing, sales, customer service and supply chain functions to achieve efficiency in creating customer value.
Kumar & Reinatz	2012	CRM is a strategic process of selecting customers that a business can serve in the most profitable manner and shaping the interactions between a business and those customers. The goal is to optimize the current and future value of customers for the company.

Source: Compilation made by authors based on the literature.

The existence of different definitions of CRM underlines, on the one hand, the absence of a consensus between the practitioners and the academics about this concept and its components and, on the other hand, the presence of several angles of approach. In fact, the way the CRM is viewed shapes the way the company conceives and adopts the CRM practices.

To alleviate this confusion, Payne and Frow (2005) proposed to define the CRM from three perspectives located on a continuum from a tactical vision through a technological vision, to a strategic vision.

- The tactical perspective is rather reductionist. It considers CRM as a specific software or computer application allowing the automation of some marketing activities in relation to the customer as is the case with the sales force automation.

- The technology perspective uses the term CRM to denote the implementation of integrated customer-oriented solutions based on information technology. It is halfway between tactical and strategic perspectives.
- The strategic perspective considers CRM as a business strategy that aims at the creation of a superior value for the company and its customers through a set of operational strategies, inspired by a philosophy and supported by technology. Its adoption and implementation require a holistic view from top management, appropriate use of information and successful integration of processes, resources and activities (Bellaaj, 2014).

2.2 CRM STRATEGIES ACCORDING TO CUSTOMER LIFE CYCLE

As mentioned above, a CRM strategy allows the company to target, acquire, develop and retain valuable customers to achieve business goals (Radcliffe, 2001). In addition, a CRM strategy must include goals and determine how resources will be used to interact with customers (Gartner Inc., 2004). Thus, four major objectives are assigned to CRM strategies:

- Identify and attract prospects with a view to converting them into customers through "lead" management strategies and acquisition strategies.
- Retain customers through retention strategies.
- Increase customer value through customer development and loyalty strategies.
- Prevent customer erosion through win-back strategies.

The table 2 below summarizes the main CRM strategies according to the customer lifecycle phase.

Table 2

Summary of the main CRM strategies.

Phase	CRM strategies
Acquisition	<ul style="list-style-type: none"> • Analyze the customer database to determine the typical customer profile and then target them through the following actions: advertising, public relations, trade shows, direct mail, newsletters, social media, cold calls, word of mouth ear... etc (Merrill Lynch, 2013). • Satisfy and retain current customers so that they become referrals for the company and thus recommend their products and services (Buttle 2009). • Push customers to try the products through promotions, special offers, etc. • Identify and attract customers through "lead management" via digital channels to recruit new customers (Suphan N, 2015).
Retention	<ul style="list-style-type: none"> • Protect relationships with important clients by constructing exit barriers, such as presenting advantages, privileges and advantages reserved for clients (Buttle 2009). • Opt for quality service and quality relationships as part of the operational excellence strategy (Treacy et Wiersema, 1996).

	<ul style="list-style-type: none"> Analyze the causes of customer defections to solve and avoid them and to anticipate the loss and departure of customers (Nasir, 2015). Segment and target customers in order to present customized products and services adapted to each segment and to each customer. Personalize offers and services to satisfy customers and to stand out from competitors. Operate the Customer Database, analyze and study the purchasing behavior of customers. Encourage referral customers who recommend the company. Establish a multi-channel contact strategy to stay in permanent contact with customers (Helfer, J. P., & Michel, G. 2006).
Development and Loyalty	<ul style="list-style-type: none"> Analyze complaints and measure satisfaction continuously Implement loyalty programs and know the reasons that amplify customer loyalty. Increase customer spending and identify up-sell and cross-sell opportunities (Buttle 2009). A cost reduction strategy for unprofitable customers or customers whose service is expensive. These can be directed to channels at a lower cost. An abandon strategy that involves letting the client go. However, the company may prefer to end the relationship when the customer shows no sign of significant contribution (Buttle, 2009).
Win-back	<ul style="list-style-type: none"> Communicate constantly with customers to know the causes of defection. Anticipate defection by analyzing and processing complaints. Separate the avoidable and unavoidable defection to know how to act.

Source: Compilation made by authors based on the literature.

2.3 CUSTOMER RELATIONSHIP RESEARCH IN THE CONTEXT OF FAMILY FIRMS

In the context of family businesses, customer service is of great importance as it is considered to be a key criterion for their success. They are called to double their efforts and deploy a set of CRM strategies in order to maintain relationships with customers while relying on their strengths and capabilities (El Hail & El Koraichi, 2022). According to the study carried out by (Cooper et al., 2005), family and non-family businesses display the same attitudes towards the importance of CRM, their knowledge about the activities that fall under the scope of CRM and their success when they implement it. The critical finding raised by this study is that CRM strategies implemented by family firms are different from those of non-family counterparts, especially in the "BtoB" segment. The specificity of family firms working in "BtoB" is confirmed by the significant involvement of the owner-manager in establishing and maintaining fruitful relationships with customers (Arsić et al., 2018). However, the transition to the next generation introduces a change in the dynamics of relationships and can cause customer attrition. First, the transmission takes place in a busy and stressful environment and the established relationships with clients may not receive the necessary attention, which negatively impacts them (Ashley et al., 2013). Second, clients and prospects often keep in touch with the founder and this may interfere with the newly established organization, especially in terms of business negotiations. Ashley et al. (2013) confirmed this finding regarding the

transition to the next generation and the necessary efforts that must be made to maintain long-lasting and profitable relationships with all stakeholders, especially customers.

In another context, the decision theory has been challenged to study the relationship between certain characteristics of the decision-making processes of family firms and the achievement of business and family goals, in order to understand why some family firms make more relevant decisions than others (Woods et al., 2019). Results show that the superiority and outperformance of family businesses are justified by their focus on customer satisfaction, product quality and family support during decision-making, which confirms the need and the usefulness of CRM in the context of family firms, since customer satisfaction is one of its main objectives. Another strong point for family firms consists in promoting their family nature to gain customer attention and engagement. This finding has been proven by the study of (Zanon and al, 2019). In fact, the social identity theory has been mobilized to show that promoting the family nature of the firm via social media leads to increased customer engagement. Thus, family firms can build a strategic competitive advantage, and then strengthen their CRM strategy, if they communicate their family nature to external audiences. Likewise, the studies carried out by (Carrigan and Buckley, 2008), and by (Sageder and al, 2015) go in this direction and shed light on the causal link between the perception of the family nature of the firm and its impact on engagement and customer loyalty. Actually, family firms hold an important social capital formed by motivated, well-trained and loyal staff, creating strong and long-lasting relationships with clients, which allow them to better know, understand and subsequently retain them, which is an asset for a CRM successful implementation (Nasir S, 2015).

After having presented the CRM conceptual framework and an overview of studies related to CRM within family businesses, the empirical part of our paper will explore the main strategies of CRM within Moroccan family SMEs as well as the influence exerted by its characteristics and specificities on the choice and adoption of those strategies.

3 METHODS

3.1 AN IN-DEPTH CASE STUDY AS A RESEARCH STRATEGY: DEFINITION AND OBJECTIFS

Our methodological choices are guided by the basic aim of exploring the CRM strategies adopted by the family businesses and understanding the influence of its

characteristics and specificities on the choice and the implementation of these CRM strategies, hence the relevance of mobilizing an exploratory qualitative study (Wacheux, 1996). The concept of qualitative study generally stands in contrast to that of quantitative study. Qualitative studies deliberately set aside the quantitative aspect to gain depth in the analysis of the subject of study (Bengtsson, 2016).

Among qualitative methods, case studies play a particularly important role, as they represent one of the most adopted qualitative methods in organizational studies (Eisenhardt, 1989), especially, in the context of family business (De Massis et al., 2012). Since the case study approach allows in-depth, multi-faceted explorations of complex issues in their real-life settings (Crowe et al., 2011), we opted for it as a research strategy in order to develop a detailed understanding of the phenomenon through its intensive study (Yin, 2009). Also, the case study method is suitable when the form of the research question is “how”, which is clearly met in this research (Yin, 2009).

Also, the definition of objectives is crucial since it shapes the study's trajectory and specifies the information that must be gathered. (Tenny et al., 2017). As for our study, the anticipated objectives are as follows:

- Identify the SME and its family character.
- Examine how leaders of family-owned SMEs perceive CRM.
- Analyze the factors influencing the adoption of CRM within family-owned SMEs.
- Explore the influence of the characteristics of family-owned SME on the CRM adoption.
- Examine the impact of the adoption and implementation of CRM on the company performances.

3.2 SAMPLING AND CASE SELECTION

A key decision is whether it is appropriate to conduct a single-case study or if the objectives of the study will be achieved through a multiple-case study (De Massis & Kotlar, 2014).

The rationale for a single case study is well supported in this context for two reasons:

- First, the aim is to gain an in-depth understanding of the subject under investigation and the unique case study allows a holistic and thorough view of the case.
- Second, the researcher must have deep access to the organization, since the information available for this kind of subject is often latent or confidential (Yin, 2009).

Since unique cases are chosen because they are unusually revelatory or extreme exemplars or because they provide opportunities for unusual research access, we chose to study “Burostyle” because it was accessible at all times and the managers are always ready for any collaboration. We had deep access to the business and the case offers a distinctive framework for our study. Moreover, preliminary interviews showed that the company increased notably over a short period of time, especially with the involvement of the second generation, which makes it a good model to raise valuable CRM practices.

3.3 DATA GATHERING AND ANALYSIS

When the research strategy is established, the next step of the process is to gather empirical data. To enhance the validity and the reliability of our study, various kinds of data have been requested (Eisenhardt, 1989). Secondary data were obtained from the internal documentation and statistics of the firm. Primary data were collected through semi-structured interviews with the help of a structured interview guide. This method enables us to obtain very detailed information as questions are asked in different ways, which gave a deeper insight. Moreover, additional knowledge could be generated thanks to questions that arise when interviews are conducted, which is a key strength of this qualitative interview method (Saunders et al. 2012).

Given the specificity of the covered topics, the choice of respondents was based on the principle that information is best gained through persons who are actively involved in the phenomenon under investigation. Therefore, informants must have a position related to CRM and Marketing activities. After preliminary interviews, we judged that the director-founder (father) and the marketing and sales manager (daughter) are the persons able to answer our queries.

The interview guide was established based on the study's objectives. The questions are listed and categorized by theme. The table 3 below provides a summary of the themes addressed and the questions asked during the semi-directive interviews.

Table 3*Interview guide.*

Theme	Questions
Respondent's Profile	<ul style="list-style-type: none"> • Would you introduce yourself and talk about your academic and professional background? • Have you undergone specific training in relationship marketing or CRM? • What is your current position in the company? and what are your main tasks and responsibilities?
Presentation of the Family SME	<ul style="list-style-type: none"> • Would you introduce your company: Industry sector, types of clients, competition, human and technological resources, etc. • Can you talk about its history and evolution? • What are the main values of your company? • What are the short, medium, and long-term goals of your company? • Could you describe the decision-making process in your company?
Identification of the Family Character of the SME	<ul style="list-style-type: none"> • How many family members are currently involved in the company? • What key positions are held by family members within the company? • How many successions have taken place since the creation of the company?
CRM perception	<ul style="list-style-type: none"> • Does your company have a clear vision of the advantages and benefits provided by the implementation of CRM tools? • If yes, what are they?
CRM adoption	<ul style="list-style-type: none"> • Can you describe the CRM tools that your company has? • How did your company get prepared before implementing CRM? • What are your CRM strategies for customer acquisition, retention, and loyalty?
Factors Influencing CRM Adoption	<ul style="list-style-type: none"> • In your experience, what factors influence the adoption of CRM within your company? • Adopting CRM may require significant changes. What are the main challenges or obstacles you have encountered in this regard?
Impacts of CRM Implementation	<ul style="list-style-type: none"> • After implementing CRM, what aspects have improved within your company? If not, could you indicate the elements (human, technical, financial, organizational, etc.) that prevent you from improving each of these aspects? • Have you conducted surveys to measure customer satisfaction after implementing CRM? If yes, has the satisfaction of your customers improved? and to what extent? • How do you measure the effectiveness of CRM? • What lessons have you learned from this experience regarding the implementation of CRM?

Source: Authors.

Before the commencement of interviews, the study's context and objectives are restated.

The collected information is manually transcribed into a Microsoft Word document as the interviews progress.

Regarding the data analysis, and since we have a unique case study, we opted for a manual content analysis. It is a qualitative method that aims to make interviewees' statements more objective and reliable for scientific treatment (Thietart, 2007). It consists of a systematic and methodical review of transcribed interviews where the researcher tries to reduce any bias by ensuring the objectivity of his research. The researcher endeavors to minimize potential biases by ensuring the objectivity of the research (Bengtsson, 2016).

In order to protect its identity, the company's name and some details haven't been revealed.

Table 4 summarizes the main constituent elements of our research design.

Table 4*Research design*

Element	Methodological choice
Research Question	"How do the characteristics and the specificities of the family small and medium enterprises influence the adoption and the implementation of CRM strategies?"
Type of Research	Qualitative.
Research Strategy	Single case study.
Sampling Method	Convenience sampling.
Data Collection	Semi-structured interviews guided by an interview guide.
Data Analysis	Manual content analysis.

Source: Authors.

4 RESULTS

4.1 COMPANY AND INTERVIEWEE PROFILE

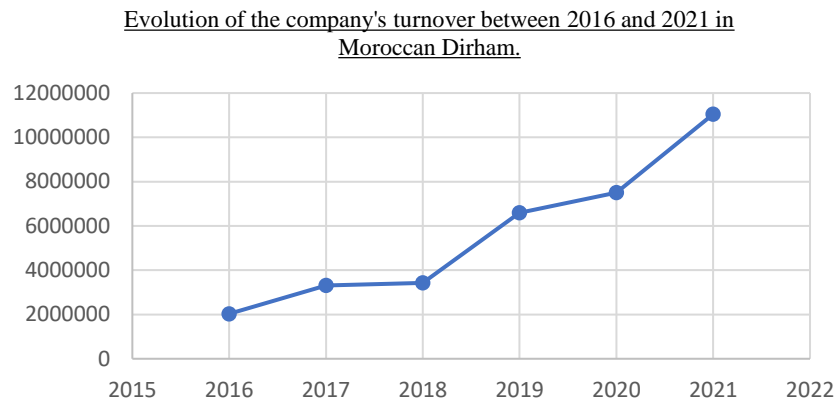
The selected case is a family medium enterprise working in the field of designing and manufacturing office furniture and school equipment and planning workspaces. The company has a total of 68 employees, including 3 family members involved in the production and management activities. It markets more than 240 products nationally and internationally, with a business-to-business clientele essentially.

The capital is held entirely by the family. It is a close family made up of the father, the mother and their children. No transmission has been made since the creation of the company and no formal succession plan exists, however, the founder implicitly prepares his descendants for this event. Strategic decision-making is done by the founder, in consultation with his 2 children who occupy key positions in the company.

The company has executed contracts with several partners such as the Ministry of National Education, the National Defense Administration, public and private universities, ...etc. The graph below illustrates the evolution of the turnover of the studied company between 2016 and 2021 in Moroccan Dirham (MAD).

Figure 1

Evolution of the company's turnover between 2016 and 2021 in Moroccan Dirham.



The founder of the company, 68 years old, previously the general manager, occupies currently a supervisory and monitoring role. He accumulated unprecedented know-how in the field of manufacturing and wishes to transfer his knowledge to his descendants. He delegates his management tasks to his daughter and his technical tasks to his son, so that they can well manage the business and be prepared for a transmission that could occur at any time.

The eldest daughter, 29 years old, holding a master's degree in digital marketing, is actually the general manager. She is responsible for all administrative tasks, in addition to initiatives related to marketing and CRM, while the son holds the position of production manager and supervises the technical staff.

4.2 CRM TOOLS AND STRATEGIES WITHIN THE STUDIED COMPANY

Before the involvement of his descendants, the father, the founder of the company, had a multitude of tasks that he had to manage alone. He explains: “The challenge for our family SME is that daily operations are time-consuming. It is a little difficult to free up time to devote it to research and development of the company”.

Moreover, the owner manager was completely unfamiliar with CRM. All the initiatives related to customers were done in a spontaneous and intuitive manner. The father mobilizes the means at his disposal to develop his client portfolio. He illustrates this: “I use the phone mainly in order to negotiate and obtain deals. I also involve my social and professional network to acquire new clients, since the company does not have a dedicated customer service”.

Since the involvement of the 2nd generation, customer relationship management within the company has undergone very profound changes.

Holder of a master's degree in digital marketing, the general manager has transformed customer service since her arrival in 2018. She made several improvements such as:

- the implementation of online and offline marketing campaigns (catalogs, online brochures and newsletters);
- the activation and the update of the company's website to expose the company's products and services to customers and to offer customers and prospects support and a service platform;
- the creation of pages dedicated to the company and its activities in social networks like Linked In, Facebook and Instagram. This allowed to interact with prospects and customers and respond to their comments and queries;
- the acquisition of a CRM application to automate the sales force, facilitate the collection of relevant customer information with a view to using it for sales and marketing purposes, as well as to reduce costs and improve the efficiency of Customer Relationship Management;
- the following statement of the general manager illustrates this: "The implementation of CRM tools has enabled the company to boost its visibility, to be closest to prospects and customers, to improve its competitive position in the market, to attract new customers and to satisfy and retain its actual customers".

The second key element discussed in the conducted interviews concerns the CRM strategies deployed by the studied company. They are summarized in the table below.

Table 5

The main CRM strategies deployed by the studied company.

	Key CRM Strategies
Acquisition strategies	<ul style="list-style-type: none"> • Prospect clients thanks to the personal and professional network of the owner-manager and the active family members. • Convert prospects into customers thanks to the company's website and the social media pages. • Allow prospects to visit factories to see production processes and judge the products' quality. • Send samples to customers so that they can try the products or to allow them to assess their quality. • Satisfy customers in order to transform them into referrals for the company. • Visit international fairs to establish business relationships in order to intensify import/export activities.
Retention strategies	<ul style="list-style-type: none"> • Offer reductions according to the quantity and frequency of purchases. • Analyze complaints to eliminate reasons for dissatisfaction, prevent customer erosion and continuously improve processes and customer relations.

	<ul style="list-style-type: none"> • Customize products according to customer preferences, and according to the capacity of production. • Move to potential customers and identify their needs. • Create a friendly relationship with customers in order to retain them. • Offer its knowledge (consulting) to customers for free. • Ensure customer satisfaction throughout their purchasing journey.
Development and loyalty strategies	<ul style="list-style-type: none"> • No formal loyalty program. • No study or segmentation of the client portfolio. • Increase customer spending thanks to up-selling and cross-selling opportunities.
Win-back strategies	<ul style="list-style-type: none"> • Communicate with customers after the purchase to evaluate their satisfaction, and learn about and resolve the causes of avoidable defection. • Stimulate the interest of unprofitable or occasional customers by offering them discounts or new or personalized products.

Source: Made by the authors based on the results of the case study

The general manager forthrightly explains: “I tried to find a good balance between my theoretical knowledge and my father's know-how to bring out original CRM strategies that are compatible with the available resources.

5 DISCUSSION

In the following section, we expose how certain characteristics relating to the family SMEs have influenced the choice and the implementation of CRM strategies and practices. It should be noted that the characteristics and particularities of the family SMEs are sometimes an asset and sometimes a barrier to the implementation of CRM practices.

5.1 ASSETS AND DRIVERS

5.1.1 Flexibility and lack of formalities

Family-owned SMEs can make decisions more swiftly due to simplified decision-making structures. They are characterized by flexible structures, centralized management and informal decision-making procedures (De Massis et al., 2016). The manager-owners enjoy a certain autonomy of decision. Therefore, family SMEs are able to make and execute strategic decisions faster, change the organization and procedures, and adopt innovations, because they are not dependent on rigid procedures and bureaucratic structures (König et al., 2013). While adopting CRM tools and strategies is a critical decision for family SMEs, their execution can be easier and smoother thanks to their flexible structures and informal procedures. In the case

studied, this feature can be advantageous in promptly addressing customer needs, such as analyzing complaints to improve processes.

Also, the flexibility of family-owned SMEs positions them as adept entities in personalizing their products and services according to the nuanced needs and preferences of their customers. This aligns seamlessly with the overarching strategy of product customization. This adaptability not only caters to the evolving demands of the market but also establishes a niche for these SMEs in providing tailored solutions that resonate with their customer base.

5.1.2 Willingness to transmit the company and its values

One of the major specificities of family businesses lies in the desire to transmit the business to future generations, which explains their long-term vision. The manager-owners consider the company as an asset that must be increased, safeguarded and transmitted to future generations, and not as an asset to be consumed (Allouche & Amann, 2012). For this, they ensure the constitution and safeguard a transmissible heritage. In fact, a company would not exist without its customers. To maximize its profits and be able to prosper, it must therefore increase its efforts to best meet their needs by focusing on good customer relationship management, while standing out from the competition. “we are obliged to deploy all the tools and strategies that allow us to retain and engage customers”.

This long-term orientation explains the focus on long-term customer retention and satisfaction, aiming to establish enduring relationships rather than one-time transactions. Additionally, the family members involved in the business can exhibit strong personal commitment to customer satisfaction. This may translate into personal visits to clients, warmer relationships, and a deep commitment to the quality of products and services.

5.1.3 Proximity to customers

Within family SMEs, customer relationships are distinguished mainly by a close relationship facilitating communication, information gathering, and exchange, etc. This resulting human relationship helps improve customer satisfaction and engagement with the business (Carrigan & Buckley, 2008), which is a facilitator of the implementation and success of CRM strategies and practices. The manager explains: “We know our customers personally.

Our relationship with most of them goes beyond work, which makes it easier for us to communicate with them effectively and reach win-win solutions for both parties”.

5.1.4 Familiness and transmission of family values

Family-owned SMEs distinguish themselves through a unique work climate characterized by fundamental human values such as trust, respect, loyalty, and commitment (Martín-Santana et al., 2020). Within these enterprises, the family plays a pivotal role in shaping the company's identity, with the family name tightly linked to the company's reputation. The transmission of social and human values, along with established standards of behavior, becomes a cornerstone for instilling a distinct family culture among employees. This extension of family values to collaborators fosters a cohesive environment known as "Familiness" (Arregle et al., 2004), generating emotional ties and a shared sense of belonging among all employees. Consequently, when undertaking projects such as CRM adoption, the implementation and management are streamlined due to the inherent cohesion within the organization (Chafik & Benjelloun, 2016). The collective dedication of the entire team to satisfying customers and developing a substantial and profitable client portfolio further exemplifies the unity of purpose. “The whole team works with vocation and determination in order to satisfy all customers and to develop an important and profitable customer portfolio for the company”.

Moreover, the communication of family values extends beyond internal dynamics to become an integral part of interactions with clients. This not only strengthens the foundation of trust but also cultivates customer loyalty. The alignment of business practices with deeply ingrained family values establishes a robust ethical framework, creating a lasting connection with customers who appreciate and identify with these shared principles. In essence, the familial influence transcends the organizational boundaries of family-owned SMEs, permeating external relationships and contributing to the sustained success and positive reputation of these enterprises.

5.1.5 Networking, family engagement and entrepreneurial culture

The distinctive nature of family-owned SMEs is underscored by their extensive personal and professional networks (Basly, 2005), a feature that plays a pivotal role in customer prospecting. Within these enterprises, familial bonds serve as a solid foundation for navigating the realm of customer acquisition, relying on trusted recommendations and personalized

contacts. This network-centric approach not only broadens their clientele but also establishes a relationship framework grounded in trust and familiarity. Another dimension of customer engagement within family-owned SMEs is the active involvement of family members in the business. This commitment transcends traditional practices, manifesting in face-to-face interactions, personal visits to clients, and an unwavering dedication to delivering top-notch products and services. The infusion of a personal touch becomes a defining element that resonates positively with the customer base. Furthermore, the entrepreneurial culture embedded in these enterprises propels them towards a proactive stance in the business landscape. Participation in international fairs, as outlined in their strategies, exemplifies this ethos as they actively seek opportunities to establish global business relationships and showcase their offerings on an international stage. This proactive approach contributes significantly to the expansion of their customer base and the diversification of business opportunities.

5.2 BARRIERS

5.2.1 Influence of the desire to keep a financial independence

The family business is driven by a desire for autonomy, both in its financing and in its governance. They operate mainly with their own funds and refuse to open up capital or resort to debt to prevent third parties from accessing it and thus keep the sovereignty of the family within the company (Tesolin & de Bruyn, 2015). This pushes them to display great prudence in terms of decisions requiring investment and a great aversion to the associated risks (Ferreira de Araujo Lima et al., 2020). However, the implementation of CRM requires a considerable investment. The family SMEs must lead organizational changes, train its employees, acquire software packages and information systems for the collection, processing and use of customer data, etc. (Farhan et al., 2018).

Since the resources of the studied company are limited, the managers are reluctant when it comes to a decision with an uncertain return on investment. “The purchase and implementation of the CRM application mentioned above were made after careful study to ensure that this decision would not put the company's finances at risk”. Also, for each CRM strategy adopted, the company essentially relies on the resources and skills at its disposal. This managerial prudence and risk aversion explain the use of less expensive CRM tools and less risky CRM strategies.

5.2.2 Favoritism and recruitment policy

As mentioned above, the adoption and implementation of CRM tools and strategies require the mobilization of qualified and well-trained human resources able to manipulate and exploit customer data to drive relevant CRM strategies (Bellaaj, 2014).

However, the recruitment of highly qualified employees within family SMEs is quite problematic because the prospects for their career development can be capped (PwC, 2011) given that the upper sphere is occupied by family members to maintain autonomy in decision-making. As a consequence, the family SMEs finds itself obliged either to recruit less qualified employees or to recruit family members despite their skills or despite the needs of the company.

In our case, and despite the fact that the general manager holds a master's degree in digital marketing, efforts and initiatives in terms of CRM remain insufficient. Further efforts should be made to improve the company's sales and marketing performance through relevant and distinctive CRM strategies that do not rely on intuition, but rather on rigorous analysis of collected data.

In conclusion, the interplay of the features mentioned above shapes the CRM strategies of family-owned SMEs. By embracing these distinctive characteristics, these enterprises not only navigate the challenges of customer relationship management but also carve out a unique space for themselves in the competitive business landscape. Family-owned SMEs can leverage their unique characteristics to cultivate strong and enduring customer relationships, emphasizing personal engagement, service customization, and agile decision-making.]

6 CONCLUSION

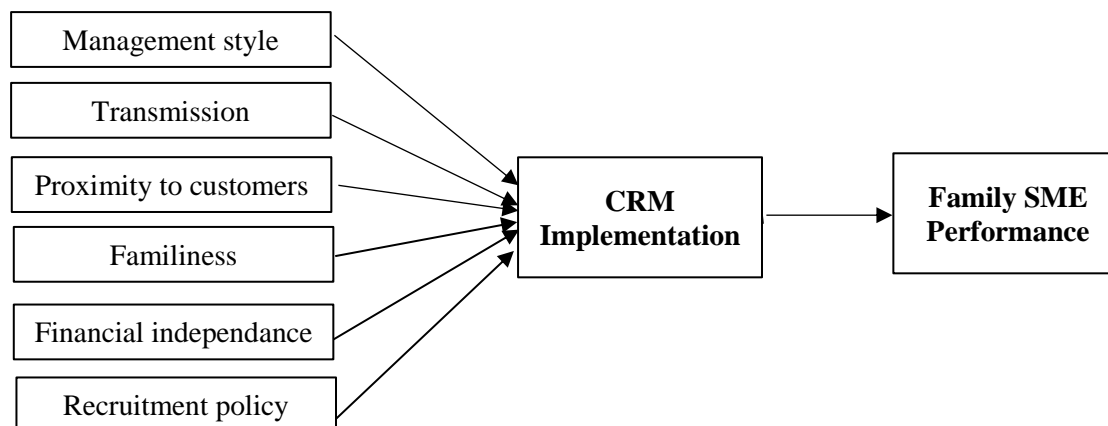
Through this study, we have highlighted causal links between the characteristics and specificities of the family SMEs and their impacts on the adoption and implementation of CRM tools and strategies. While some characteristics linked to the nature of family SMEs such as participatory management style, familiness, the desire to transmit the business to future generations and proximity to customers constitute assets for the implementation of CRM, other characteristics, such as the desire to maintain financial independence and recruitment policies that are most often in favor of family members despite their competence, can negatively influence the implementation of successful CRM projects.

The results of the present paper allow the authors to draw conclusions that are relevant to both academics and practitioners. As for the theoretical implications, this study highlights the relationship between the characteristics of family SMEs and the choice and implementation of CRM strategies, while relying on their strengths. Furthermore, developing a good understanding of the specificity of CRM adoption and implementation approaches within family SMEs has important managerial implications for family SME decision-makers, as it can help them make better decisions regarding the choice of relevant CRM strategies and to optimize the deployment of available human, financial and technological resources, while relying on their socio-emotional wealth and their motivation to perpetuate the company.

The results of our contribution should be put into perspective. Three main limitations can be identified in our research. The reduced size makes it impossible to generalize the results obtained. The research is mainly based on interviews with the general manager and the founder, which may constitute a bias even if few formal documents are available on this subject. Our interpretations may be enriched by the points of view of external stakeholders, more specifically customers. Therefore, for a better understanding, further empirical studies should involve more businesses to test the following model:

Figure 2

A conceptual framework



Source: Authors.

Nevertheless, this contribution constitutes a track to enrich the works relating to CRM within family firms. Future studies may provide a conceptual framework to explain the decision of Family SMEs to adopt and implement CRM strategies, to empirically test the factors relating to the specifics of family SMEs that are likely to catalyze or inhibit this process and to prioritize the extent of the impact of these factors on the decision to adopt and implement CRM strategies

by family SMEs. The ultimate objective is the proposal of actions and recommendations for the successful integration of CRM strategies within family SMEs.

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