

# Course: Software Technologies and Enterprise Architecture



**WEEK 9: Customer Relationship management (CRM) and User experience (UX) in Enterprise Architecture**

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# WEEK 9: Customer Relationship management (CRM) and User experience (UX) in Enterprise Architecture

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- Customer Relationship Management (CRM)
- Key Benefits and Challenges of Implementing CRM
- Top CRM Software in 2025
- User Experience(UX) in CRM
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# **WEEK 9: Customer Relationship management (CRM) and User experience (UX) in Enterprise Architecture**

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**By the end of this unit, the student will be able to**

- Understand the role of Customer Relationship Management (CRM) and User Experience (UX) in enterprise architecture.
- Evaluate the benefits and challenges of CRM implementation.
- Compare and contrast leading CRM software solutions in 2025.
- Explain how ERP–CRM integration enhances business efficiency and customer satisfaction.

# Customer Relationship Management (CRM)

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## What is CRM (Customer Relationship Management)?

- Customer Relationship Management is an approach in order to manage the company's interaction with the current customer.
- It is one such management process in which the companies can maintain a good relationship and stay connected to the customers. In turn it also improves the profitability of the company.
- The CRM software gathers all the data of the customers from multiple channels. Hence, CRM stores detailed information of the customers about the overall purchase history, personal info, and purchasing behavior.

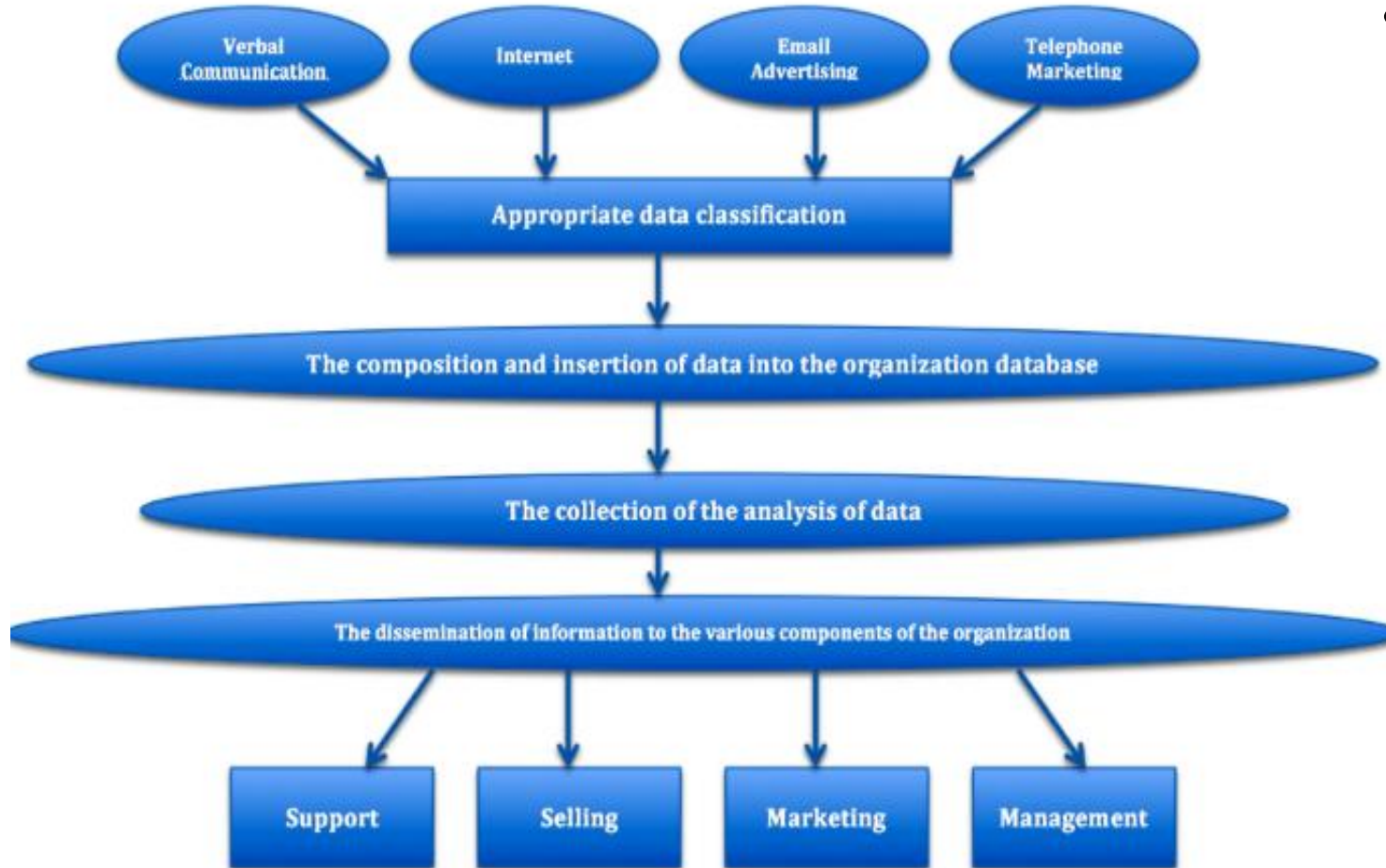
# Cont. ... Customer Relationship Management (CRM)

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- Customer Relationship Management (CRM) is a business approach supported by technology to manage and analyze customer interactions and data throughout the customer journey.
- The goal of CRM is to improve business relationships, enhance customer satisfaction, and drive sales growth by organizing customer information in a centralized system.
- Most modern CRM systems help businesses streamline communication, track leads, automate tasks, and gain insights into customer behavior, ultimately leading to better decision-making and long-term customer loyalty.

# Cont. ...Customer Relationship Management (CRM)

## Components in the different types of CRM



- The image illustrates the lifecycle of data management and information flow within an organization, from initial collection to internal distribution.

# Cont. ...Customer Relationship Management (CRM)

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## Foundations of CRM

- The foundational elements of a CRM application encompass multiple imperative components.
- CRM is a necessary element within a business strategy, allowing the monitoring and communication with customers.
- The introduction of CRM software is a multifaceted procedure, demanding cautious attention to countless dynamic elements.
- While CRM software is useful, a well-devised plan is necessary to assure its utilization in building a robust CRM framework that goes well with and supports the business endeavors.

# Cont. ...Customer Relationship Management (CRM)

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## .....Foundations of CRM

### **Vision**

- The foundation of any organization depends on its vision, a factor that doesn't go through a procedural set of steps.
- Understanding the fundamentals of successful customer-centric strategies is important for nurturing the organization's vision and finding out what it desires to offer its customers.

### **Strategy**

- To realize the visualized objectives, it is necessary to formulate procedures that seamlessly integrate into managerial activities.
- Keeping the customer base at the front line is necessary to validate the productivity and worthiness of the devised strategies.

# Cont. ... Customer Relationship Management (CRM)

## .....Foundations of CRM

### Customer Experience

- Technology has completely reshaped our world, and with it, the customer experience. What one person considers a great experience might be different for another, but one thing is clear: it's a top priority.

### Organization collaboration

- Collaborative CRM deals with synchronization and integration of customer interaction and channels of communications like phone, email, fax, web, etc., with the intent of referencing the customers a consistent and systematic way.
- Enhance the interactions, but also to increase and improve customer retention and liberty.



# Cont. ... Customer Relationship Management (CRM)

## .....Foundations of CRM

### Processes

- The term processes in CRM application is the activities and strategies the company uses to manage the interactions with its current customers.

### Information and insight

- All those different departments, initiatives, and systems within your company generate a wealth of valuable customer information.
- Businesses that have a clear plan for collecting, managing, and using this customer data are far more likely to hit their CRM goals, gain a competitive edge, and truly understand their customers.



# Cont. ... Customer Relationship Management (CRM)

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## .....Foundations of CRM

### Technology

- CRM application starts and ends with technology. It manages the data and information, IT infrastructure, customer-facing application, and architecture. Online CRM makes it easy to access through its technology.
- Technology serves as a partner to CRM to fulfil the needs of customers.
- As the technology evolves, the CRM also evolves to bring continuous demand of customers.
- This helps to gather the information of the customers and communicate with them faster. The relationship between the customer and the company becomes stronger through technology.

# Cont. ... Customer Relationship Management (CRM)

## .....Foundations of CRM

### Metrics

- The metrics helps to measure the internal and external indications of success and failure in CRM.
- The CRM metrics help to achieve the goals in a short period for the business organization. This works efficiently to keep the business aligned and improve growth. CRM metrics boost the creativity of the organization.

### Building block of CRM



# Key Benefits and Challenges of Implementing CRM

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## Benefits of implementing CRM software.

- **Improved Customer Relationships** – CRM systems help businesses track customer interactions, preferences, and history, allowing them to provide personalized service and build stronger relationships.
- **Better Data Organization & Management** – All customer information is stored in one place, making it easier for employees to access and update records, reducing data duplication and errors.
- **Enhanced Sales and Marketing Efforts** – CRM software automates tasks like lead tracking, email marketing, and follow-ups, helping sales teams focus on closing deals while marketing teams target the right audience.

# Cont. ...Key Benefits and Challenges of Implementing CRM

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## Challenges

- **High Implementation Costs** – Setting up a CRM system can be expensive, especially for small businesses.
- **User Adoption and Resistance to Change** – Employees may resist using a new system. Proper training is essential.
- **Complexity of Integration** – Integrating CRM with ERP, accounting, or e-commerce systems may require IT expertise.

[2]. What Is Customer Relationship Management (CRM)?”, Priyanka Sharma, igmGuru, 2026. <https://www.igmguru.com/blog/what-is-crm>

# Cont. ...Key Benefits and Challenges of Implementing CRM

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## Cont. ....Challenges

- **Data Security and Privacy Risks** – Large volumes of data demand strong cybersecurity measures and compliance with data protection regulations.
- **Customization and Maintenance Challenges** – A CRM system must be tailored to the company's needs and regularly updated.
- **Data Accuracy & Quality Issues** – Outdated or incorrect entries may lead to poor insights and customer service.
- **Over-Reliance on Technology** – Businesses should balance automation with genuine human interactions.

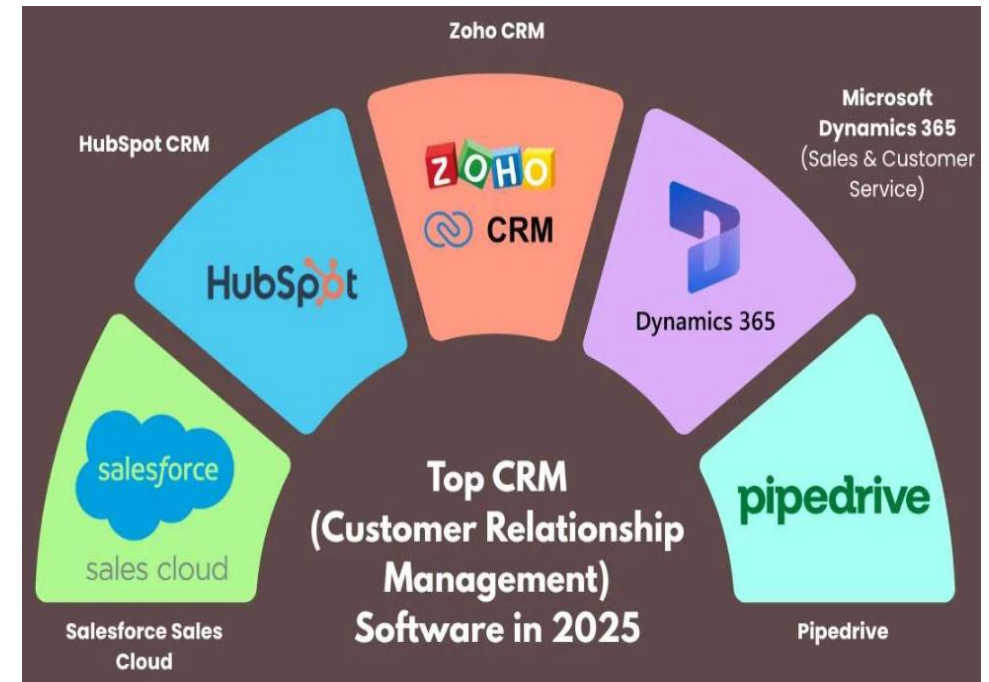
# Top CRM Software in 2025

## 1) Salesforce Sales Cloud

- Salesforce is now focused on Agent Force/EINSTEIN AI and richer low-code automation for cross-team workflows. It's extremely flexible and deeply extensible via AppExchange.
- **Standouts** – advanced AI assistants, revenue intelligence, industry clouds, huge partner ecosystem.

**Ideal for** – midmarket to large enterprises with complex sales processes and integration needs.

**Price note** – tiered plans; entry tiers exist, but real value often comes at higher tiers with add-ons.



[3]. Customer Relationship Management (CRM): Everything You Need to Know”, The Enterprise World, The Enterprise World, 2023.<https://theenterpriseworld.com/customer-relationship-management/>

# Cont. ...Top CRM Software in 2025

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## 2) HubSpot CRM (Sales Hub + Service Hub)

- **What it is** – a very user-friendly CRM (customer relationship management) with a powerful free tier and paid hubs (Sales Marketing Service).
  - HubSpot remains a favorite for teams that want fast adoption and built-in marketing automation.
  - **Standouts** – easy onboarding, HubSpot Academy resources, unified free CRM that scales into paid Hubs.
- Ideal for** – startups, small and growing marketing-led teams that want one platform for marketing and sales.

# Cont. ...Top CRM Software in 2025

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## 3) Zoho CRM

- A full-featured CRM that sits inside the Zoho product suite (finance, desk, commerce). Zoho ships steady quarterly improvements and affordable pricing for SMBs while layering AI features across modules.
- **Standouts** – price to features ratio, strong SMB focus, many integrated apps (email, books, desk).  
**Ideal for** small to medium businesses that want a single vendor for many business apps.

[3]. Customer Relationship Management (CRM): Everything You Need to Know”, The Enterprise World, The Enterprise World, 2023.<https://theenterpriseworld.com/customer-relationship-management/>

# Cont. ...Top CRM Software in 2025

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## 4) Microsoft Dynamics 365 (Sales & Customer Service)

- A modular CRM suite that ties CRM to ERP and the Microsoft Power Platform.
- Dynamics has been pushing Copilot and Power Platform automation across Sales and Customer Service in 2025. Great for organizations that rely on Microsoft 365 and Azure.
- Has strong native integrations with Teams, Outlook, and Power BI; enterprise security and role-based Copilot features.
- Ideal for enterprises already using Microsoft cloud stacks and needing AI embedded into workflows.

# Cont. ...Top CRM Software in 2025

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## 5) Pipedrive

- **What it is** – a UX-driven CRM built around pipeline visualizations and sales activity. Pipedrive makes it simple to see deals, automate follow-ups, and measure rep activity.
- **Standouts** – excellent pipeline UX, easy automations, straightforward pricing.
- **Ideal for** – small sales teams and solo sellers who value clarity and fast adoption.

[3]. Customer Relationship Management (CRM): Everything You Need to Know”, The Enterprise World, The Enterprise World, 2023.<https://theenterpriseworld.com/customer-relationship-management/>

# User Experience(UX) in CRM

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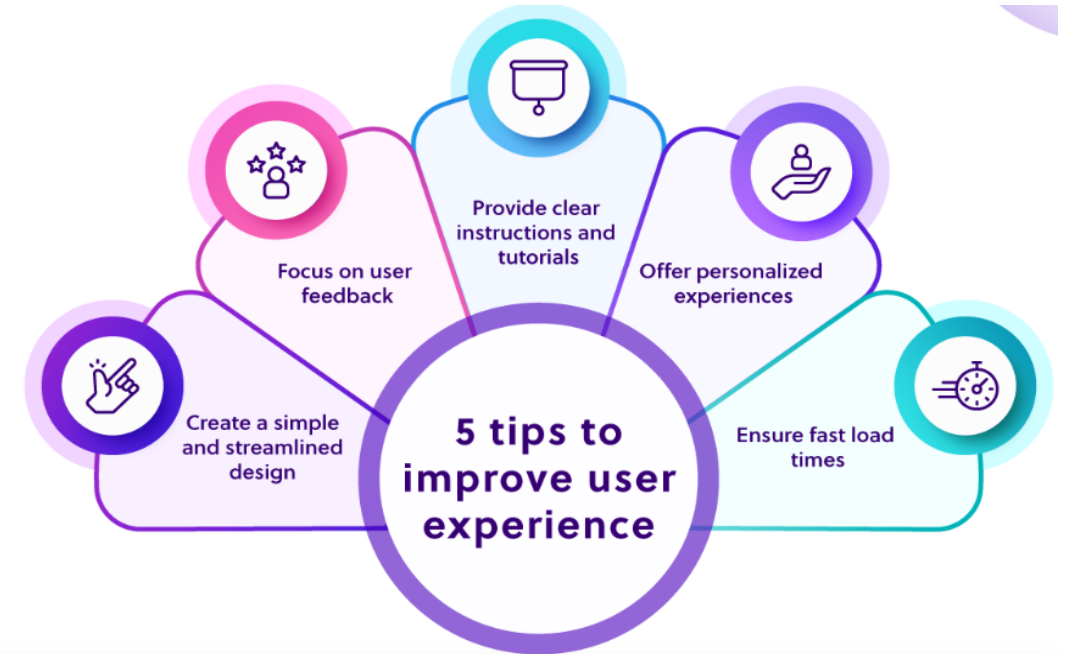
- The primary goal of any business is to generate profits over time and one of the ways this is possible is through effective customer relationship management (CRM).
- One familiar term in business is user experience and how it has a direct impact on businesses, as it plays a huge role in customer experience, which further impacts customer acquisition and retention.
- This subsequently leads to an increased market share.

[4]. User Experience & Customer Relationship Management”, Charisol, Charisol, 2023, Page not specified. <https://charisol.io/user-experience-customer-relationship-management/>

# Cont. ... User Experience(UX) in CRM

## How to Improve User Experience?

- Improving the user experience is a crucial element of any product or service.
- To ensure our platform is as user-friendly and enjoyable as possible, there are a few things you should keep in mind.



[5]. User Experience, Bytes Route, Bytes Route.  
<https://www.bytesroute.com/glossary/user-experience.html>

# Cont. ...User Experience(UX) in CRM

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## User Experience Vs Customer Experience

- User Experience (UX) focuses on how people or prospective customers interact with our product.
- The goal is to make a product that provides positive experiences to not only fulfill the user's needs but to also keep them loyal to the product.
- We can measure UX with metrics such as time on task, completion rates, error rates, abandonment rates, adoption, and retention.

[6]. The Importance of User Experience in Customer Relationship Management, Oluwatosin Faith Kolawole, Charisol, 2021.<https://charisol.io/user-experience-customer-relationship-management/>

# Cont. ...User Experience(UX) in CRM

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## ..... User Experience Vs Customer Experience

- Customer Experience (CX) deals with the interactions between the business and its customers.
- This includes everything related to the business that affects the customer's feelings and perception about it, which might influence their buying decision.
- A good customer experience involves appreciating the customers' time and providing helpful resources to make their experience with our brand smoother.
- We can measure CX with metrics such as customer satisfaction, retention rate, churn rate, and referral rate.

# Cont. ...User Experience(UX) in CRM

## User Experience vs User Interface



### User Experience (UX)

UX centers on the overall experience that a user has when engaging with a product or service, from the beginning to the end. It covers everything from ease of use to how well the product meets the user's needs and how it makes them feel.

**What's the difference between User Experience & User Interface?**



### User Interface (UI)

UI focuses on the visual and interactive elements that users directly engage with, such as buttons, menus, and forms. UI designers use their skills in graphic design, typography and color theory to create an attractive and user-friendly interface that complements the overall user experience.

# Cont. ...User Experience(UX) in CRM

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## How Does UX Affect Customer Relationship Management?

### 1. It Ensures the Product is Designed for the Target Audience

- When choosing a CRM solution for our business or organization, you want to ensure it is designed for the audience it is intended for.
- This is where UX comes in, as it focuses on designing or developing a product to meet the needs of the users.
- Check the design usability of your preferred CRM solution and develop it to match the needs of the target audience in your organization.
- Also test it with users directly to improve the user experience over time for more customers.

# Cont. ...User Experience(UX) in CRM

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## Cont. ...How Does UX Affect Customer Relationship Management?

### 2. It Guarantees CRM Usability

- The goal of CRM integration in a business is to improve the relationship between the business and its customers.
- However, if the CRM is not designed to be used effectively, employees won't be able to use it as they should, and you may not get the results you expect in your business. This can, in turn, affect your customer retention rate.
- UX considers the usability of the CRM solution among employees by ensuring it has the appropriate design and works as fast as possible.
- UX also ensures the tool does not present inappropriate data or unrelated search results that might make it frustrating to use.

# Cont. ...User Experience(UX) in CRM

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## 3. It Helps Execute Business Plan

- Every solid business has a plan in place and if you will be working with a CRM system, this plan has to be factored into the integration.
- A UX researcher would consider the purpose and scope of the business, which will then determine the features to be included while developing the CRM solution.
- Many things are involved in executing a business plan and your CRM solution should certainly not be left out.

# Cont. ...User Experience(UX) in CRM

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## 4. Improves Communication among Teams

- One of the major benefits of CRM is that everyone in your organization can communicate effectively and further improve customer retention rates.
- However, this is much easier when the CRM has a well-designed UX. This means they would have easy access to all the relevant information in the organization's system, which automatically improves communications among teams.
- By having access to simple information on previous and current customers and communicating effectively with teammates, employees can then provide a better customer service experience.

# Cont. ...User Experience(UX) in CRM

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## 5. Cost-effective

- With a UX-focused CRM solution, you won't have to spend extra on training your staff, as they will be able to readily and easily navigate the tool.
- This helps to save more time and money allocated to training and troubleshooting with support teams.
- This also means you get to buy more time to focus on other profitable activities in the business.

[6]. The Importance of User Experience in Customer Relationship Management, Oluwatosin Faith Kolawole, Charisol, 2021.<https://charisol.io/user-experience-customer-relationship-management/>

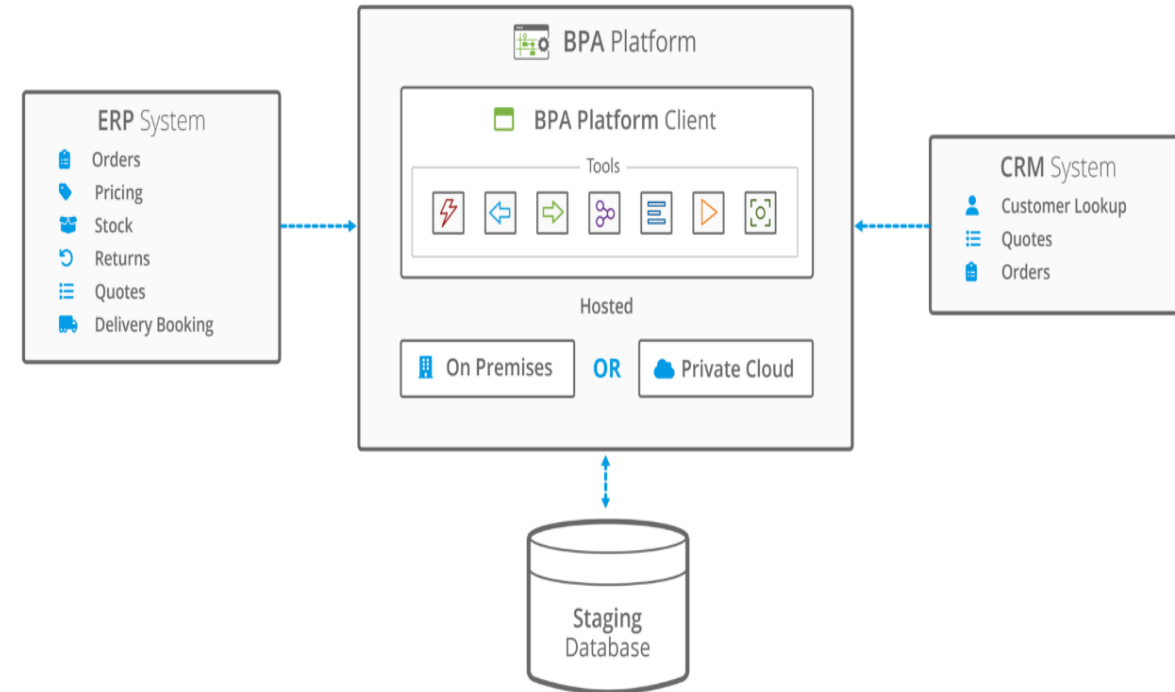
# ERP and CRM Integration

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- ERP CRM integration creates the backbone of a connected business architecture by aligning commercial processes with operational and financial data.
- When these systems work together, organisations gain consistent, real-time visibility across sales, finance, operations, and fulfilment.
- Effective ERP and CRM integration removes operational silos and provides unified visibility across the entire order-to-cash cycle.
- Integration between CRM and ERP systems removes data silos, reduces manual administration tasks, and streamlines end-to-end business processes, ultimately enhancing operational efficiency and customer satisfaction.

# Cont. ... ERP and CRM Integration

- Typical CRM ERP integration architecture showing synchronised data flows between sales, finance, operations, and warehousing systems.
- ERP platforms typically manage product data, pricing, inventory, order fulfilment, financial accounts and procurement.
- CRM systems manage customer relationships, opportunities, quotes, and interactions.



# Cont. ... ERP and CRM Integration

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- ERP integration with CRM is one of the most strategic initiatives for organisations looking to unify financial, operational, and commercial data.
- ERP platforms typically manage:
  - Product and inventory master data
  - Pricing and discount structures
  - Order processing and fulfilment
  - Financial accounts, invoices, and credit control
  - Production and procurement workflows

[7]. What Is CRM Integration?," Codeless Platforms, Codeless Platforms.  
<https://www.codelessplatforms.com/what-is-crm-integration/>

# Cont. ... ERP and CRM Integration

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- CRM platforms, by contrast, manage customer interactions, opportunities, quotes, and pipeline activity.
- Without integration, teams work from contradictory information, leading to:
  - Misinformed sales commitments
  - Incorrect pricing or discounting
  - Inventory discrepancies
  - Delayed fulfilment
  - Revenue leakage

# Cont. ... ERP and CRM Integration

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## Business Process Automation (BPA) Platforms

- BPA platforms are designed to automate complete business processes across multiple systems, departments, and data sources.
- They combine integration capabilities with workflow automation, rules management, approvals, and exception handling, enabling organisations to orchestrate multi-step processes from end to end.

# Cont. ... ERP and CRM Integration

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- BPA platforms support operational logic, long-running workflows and hybrid integration scenarios involving both cloud and on-premises systems.
- Strengths of BPA Platform:
  - Visual, low-code workflow design suited to business analysts and operations teams
  - Rich process automation features including rules, branching, timers, and approvals
  - Strong exception handling, auditability, and operational control
  - Native support for legacy databases, on-premises applications, and file-based workflows
  - Predictable, non-consumption licensing models

# Summary

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- CRM is a vital tool for modern businesses seeking to build meaningful relationships with their customers.
- CRM systems help organizations centralize customer data and streamline communication across departments to enhance customer satisfaction, improve operational efficiency, and drive long-term growth.
- As customer expectations continue to evolve, adopting a robust CRM strategy is no longer optional; it's essential for staying competitive in today's dynamic market.
- Benefits of CRM: Builds stronger customer relationships through personalization, improves data organization and management, and enhances sales and marketing automation.

# Cont. ...Summary

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- Challenges of CRM include: High implementation costs, Resistance to change and user adoption issues, Complexity of integration with ERP and other systems, Risks in data security, customization, and accuracy, and Over-reliance on technology.
- Top CRM tools in 2025: Salesforce, HubSpot, Zoho, Microsoft Dynamics 365, and Pipedrive.
- UX ensures usability, adoption, and cost-effectiveness, directly impacting customer satisfaction and retention.
- ERP–CRM integration unifies operations and finance, eliminates silos, and boosts efficiency.

# References

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1. What is CRM (Customer Relationship Management)?”, SalesBabu Business Solutions Pvt. Ltd., SalesBabu, 2024. <https://www.salesbabu.com/blog/what-is-crm-customer-relationship-management>.
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4. User Experience & Customer Relationship Management”, Charisol, Charisol, 2023, Page not specified. <https://charisol.io/user-experience-customer-relationship-management>.
5. User Experience, Bytes Route, Bytes Route. <https://www.bytesroute.com/glossary/user-experience.html>.
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