

# Rethinking Customer Relationships: Digital Transformation and Sociotechnical Dynamics of Social CRM in SMEs

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**ABSTRACT :** The transformation of Customer Relationship Management (CRM) towards Social CRM (SCRM) has presented itself as a distinctive challenge in modern marketing due to increased digitalisation. Notwithstanding its critical nature, the large part of the SCRM literature remains anchored in outdated theoretical perspectives and fails to address modern views of organizational capabilities, sociotechnical systems and digital appropriation. In this paper, this gap is addressed with the help of mobilization of the recent literature and sociotechnical theories and studying the adoption, adaptation of SCRM by SMEs. The investigation of organizational capabilities of working in digital environments through a qualitative approach with semi-structured interviews and thematic coding facilitated by NVivo points to significant findings: (1) organizational capabilities related to working in digital environments are dynamic and learning processes ongoing, (2) the sociotechnical integration of human actors, technologies, and organizational culture lays the background to the successful introduction of SCRM, and (3) SMEs struggle with finding the balance between the need to automate their processes and still retain a sense of engagement with human beings. This paper has theoretical contributions, which include the Sociotechnical and organization capability perspectives incorporated into the SCRM body of literature, and practical contributions in the form of guidelines SMEs can follow in adopting digital ways sustainably.

**KEYWORDS** Social CRM, Digital Transformation, Organizational Capabilities, Sociotechnical Systems, Technology Appropriation

## I. INTRODUCTION

Digitization has come out as one of the strongest drivers causing a paradigm shift in business model, customer engagement precedence, as well as competition within business sectors. Companies have more and more reasons to switch to the technologies that allow them to be personalized, agile and create greater responsiveness to their customers. In this regard, movement of the conventional Customer Relationship Management (CRM) systems to the Social CRM (SCRM) is a paradigm shift in the way organizations conceptualize and put into practice the relationship they have with their customers. As opposed to the historical focus of CRM on data rationalization, process management and efficiency, SCRM focuses on constant engagement and co-generation of value and exploitation of digital platforms to develop stronger and trust-driven relationships with customers (Trainor et al., 2014; Baydeniz, Çilgınoğlu & Valeri, 2024).

This development of SCRM is part of the changes in the business environment. To begin with, customers are today taking an increasingly proactive position on developing firm reputation, service experiences and innovation trajectories. Digital communities and the social media outlets allow the consumers to become collaborators in the production of the content, brand ambassadors, and even critics whose opinions follow and reach far beyond the global markets. Second, the increasing complexity of data analytics, artificial intelligence and automation technologies are changing the magnitude and scope of customer insights accessible to businesses. With these developments come opportunities and challenges: although companies today can now predict needs, and personalize interactions in real time, new areas of concern are also emerging where two-way development is mandatory to factors of authenticity, privacy and cultural compliance; in their digital engagement strategies.

These dynamics are especially prominent in the case of small and medium-sized businesses (SMEs ). SMEs deal with constraints and limitations to resources and structures, but they exhibit greater agility and dynamic ability in most cases as opposed to larger companies. They are therefore in both senses vulnerable and well-situated in the digital environment: vulnerable due to their lack of scale and budgets of multinational corporations, but well-positioned due to their ability to experiment, learn and rapidly integrate digital tools in cases of leadership commitment and cultural readiness.

As the rise in relevance of SCRM, most of the academic literature still remains rooted in fundamental theories which include resource-based view (Barney, 1991), and dynamic capabilities theory (Teece, Pisano and Shuen, 1997). Although these frameworks provide important perspectives on the sites of how companies develop and draw on resources to develop a competitive edge, they fail in tracking down the intricacies of digital places marked by swift technological change, sociotechnical interdependencies and emergent forms of customer involvement. Theoretical approaches More recent theoretical approaches pay particular attention to the need to examine SCRM through integrative perspectives: digital transformation research focuses on the strategic and cultural changes needed to maximize the potential of technology (Vial, 2021); sociotechnical research on the concomitant optimization of social and technical subsystems (Orlikowski, 2000; Cardoso et al., 2023); and appropriation studies on how technologies get integrated into everyday operations and the role of organizational culture and individual agency (Wiese et al., 2024).

These directions are supported by recent contributions. Gonzalez-Varona et al. (2024) identify as crucial to successful digital adoption in SMEs organizational capabilities such as digital, cross-functional collaboration as well as data-based decisions. Cui (2025) concludes that the digital transformation led by AI increases the performance of firms through a collaboration of human and AI, it is necessary to emphasize that a technological investment should be accompanied by new human practices as well as organizational learning forms of management. Such insights imply that to comprehend SCRM adoption an alternative to assuming that static models of resource implementation is necessary to comprehend sociotechnical and culturally embedded views on a dynamic environment.

It is in this backdrop that the current paper will attempt to fill two gaps within the literature. To begin with, SCRM research lacks relevant theory updating, as the studies are too tied to outdated conceptual framework thinking and too disconnected to state of the art concepts of digital reformation and social-technical fit. Second, no empirical studies addressing the question of how SMEs appropriate the SCRM practices, i.e., how they internalize digital tools into organizational practices, have been conducted. Filling these gaps is essential to both theory and practice.

Based on this, the aims of the research are three-fold: (1) to contribute to the SCRM scholarship by incorporating the sociotechnical systems theory, perspectives of digital appropriation and frameworks of organizational capabilities; (2) to deliver an empirically based knowledge on how SMEs develop and maintain SCRM practices within the digital transformative context; and (3) to develop actionable ideas that can be used by the managers of SMEs to build a resilient, human-centered and technologically informed approach to customer engagement. The overarching question to be addressed by the research is the following one: How do SMEs use and maintain Social CRM practice in a digital context of organizational transformation and which organizational capabilities and cultural conditions underpin their success?

## **II. LITERATURE REVIEW AND THEORETICAL FRAMEWORK**

**From CRM to SCRM :** Historical focus has been with regard to traditional CRM which focuses more on transaction efficiency, centralization of data and customer regularizations of customer interactions. Nonetheless, with the emergence of social media and online platforms, this paradigm has shifted towards Social CRM (SCRM), which comprises two-way communication, personalisation and customer co-creation (Trainor et al., 2014). Çapar and Aslan (2020) emphasise that the advent of experiential consumption motivated organisations to take CRM beyond data management into relational value creation. According to more recent contributions, SCRM is the central factor that helps to build brand communities and shapes behavioral intentions as well as the development of trust (Baydeniz et al., 2024). SCRM therefore is not only a change in technology, but a radical rethinking of customer relations. It accesses analytics, feedback in real time as well as to co-create content that boosts relational capital. It is not enough to rely on platforms and algorithms but rather on organizational culture and capabilities in terms of their success with this evolution.

**Digital Transformation Capabilities of an Organization :** The digital transformation is growingly seen as capability driven. According to Gonzalez-Varona et al. (2024), SMEs are urged to build specialization in digital such as data-driven decision-making, agility in platform integrations, and cross-functional collaboration. These competencies fit into the dynamic capabilities framework as proposed by Teece (1997) however recent findings are highlighting that digital transformation should be an iterative experimentation process rather than a once in a lifetime investment. Cui (2025) also emphasizes the importance of AI-fueled transformation in which human-AI collaboration allows creating innovative approaches and performance.

**Sociotechnical Point of views :** Sociotechnical system theory challenges any isolation possibilities of technological tools and claims them to be embedded in the social contexts (Vial, 2021). A helpful conceptual tool is offered by Orlikowski (2000) with reference to the duality of technology: technologies are enacted by human actors who also reproduce and transform the structures of organizations. Sebastiani et al. (2023) supplement the claim by pointing out that the success of digital transformation drives is strongly conditioned by the conscious attempt to standardize the reliance between the technical systems (platforms, data infrastructures, on the one hand, or employee roles, cultural norms, managerial practices, on the other).

Sociotechnical alignment is important in the case of SCRM. No amount of off-the-shelf chatbots, sentiment parsing, and AI-driven dashboards may create value unless employees are empowered and trained to supplement mechanized results with emotionally sensitive human contact. Such disalignment can pose a risk to digital efforts which may instead generate customer distance as opposed to connection.

**Appropriation by SMEs online:** In the case of SMEs, resource constraints and practical experimentation tend to influence the development of the process of digital appropriation. As demonstrated by Wiese et al. (2024), the impact of organization culture on SMEs adopting Industry 4.0 technologies is quite large, and flexible, innovation- centred cultures prevail over hierarchical cultures. Correspondingly, we can see how Alshammari et al. (2024) prove that employee empowerment is a cultural precondition to the success of digital projects. SMEs which promote independence as well as promote iterative usage of the tools are more likely to implement SCRM on a more sustainable basis. Employee digital literacy and leadership support also emerge as employees are shown to be taking more responsibility. SMEs that organise their staff by using structured learning strategies and those straight line leaders who promote the presence of digital engagement within SMEs are likely to entrench the practice of SCRM as a sustainable venture. In the centrality of this cultural disposition of experimentation and learning lies the bridge between mere acquisition and substantive appropriation of technology. The previously mentioned implies that SCRM success is associated with the ability of the firms to restructure and reorganize resources in a dynamic way. This reflects in the ability to acquire more sophisticated CRM tool guaranteed by the use of predictive analytics, chatbots, and recommendation engines powered by AI.

### III. METHODOLOGY

**Research Framework:** This study is part of a qualitative exploratory perspective aimed at deepening the understanding of the organizational and relational factors conditioning the migration to social CRM (S-CRM) and its effects on customer engagement, in a context of digital transition of Tunisian companies. The choice of the qualitative approach is based on the need to grasp the richness of lived experiences, social representations, as well as the logics of action of the actors involved in this organizational transformation (Miles, Huberman & Saldaña, 2014; Gioia, Corley & Hamilton, 2013). In accordance with methodological recommendations (Paillé & Mucchielli, 2021), we have adopted an inductive approach articulated to an initial theoretical framework, in an abductive logic (Dubois & Gadde, 2002), mobilizing in particular the cross-contributions of Resource-Based View (Barney, 1991) and the theory of social exchange (Blau, 1964).

**Sampling strategy :** Sampling is reasoned and theoretical (Glaser & Strauss, 1967; Charmaz, 2014), based on the selection of ten digital marketing managers from various sectors, all involved in CRM to social CRM transformation projects. Respondents have between 4- and 25-years' professional experience, guaranteeing a diversity of experience (Table 1). With an average duration of 45 minutes (varying from 30 to 60 minutes), a semi-structured interview guide was conducted over a period of 3 months, covering the themes of social CRM, the skills needed, and the encountered resistance (see Appendix X). The principle of theoretical saturation was reached from the 10th interview, as no significant new data had emerged at this stage (Guest, Bunce & Johnson, 2006).

**Data processing and analysis :** The data were analyzed using **NVivo 14** software, a commonly used tool for processing qualitative data in marketing research (Sinkovics & Alfoldi, 2012; Woods, Paulus, Atkins & Macklin, 2016). The analysis was conducted in three successive phases:

- **Open coding**, based on a line-by-line reading of transcripts to generate first inductive categories;
- **Axial coding**, aimed at linking categories together around structuring concepts;
- **Selective coding**, to extract key dimensions and formulate emerging theoretical propositions.

Searches by co-occurrence queries, coding matrices, as well as word cloud were produced in order to identify significant lexical patterns (see Appendix 1). A double cross-coding (between two researchers) was conducted on 30% of the interviews in order to strengthen inter-rater reliability (Creswell & Poth, 2018). The traceability of

operations (audit trail) and triangulation with the theoretical literature have made it possible to strengthen the credibility and transferability of the results (Lincoln & Guba, 1985).

#### IV. DATA ANALYSIS

##### Co-occurrence analysis

Frequently associated terms reveal recurring patterns (*Table 1*).

**Table 1: Thematic associations**

| Main Term                               | Frequent Co-occurrences                                 | Interpretation                                        |
|-----------------------------------------|---------------------------------------------------------|-------------------------------------------------------|
| CRM Social                              | "Two-way communication", "Real-time engagement"         | Dynamic interaction with customers.                   |
| Resistance and Circumvention Strategies | "Lack of skills", "Traditional culture"                 | Obstacles related to gaps and organizational inertia. |
| Technical Skills                        | "Hootsuite", "Data Analytics", "Digital Marketing"      | Mastery of social listening tools is essential.       |
| Soft Skills                             | "Collaboration", "Stress management"                    | Behavioral skills crucial for adaptation.             |
| Training                                | "External certifications", "Recruitment of specialists" | Use of upskilling and experts.                        |

Source : Nvivo

Based on the most frequent co-occurrences noted in the interviews, five major themes emerged. These themes reflect the essential dimensions of the transition to social CRM, as perceived by the actors interviewed. Each theme is enriched with representative verbatims to reinforce the empirical anchoring of the analysis.

**1. Social CRM :** Social CRM is massively associated with two-way communication and real-time engagement, revealing a profound transformation in relational practices.

✚ " Social CRM integrates the social media strategy for interacting with customers, which allows for two-way communication that engages customers. (P1)

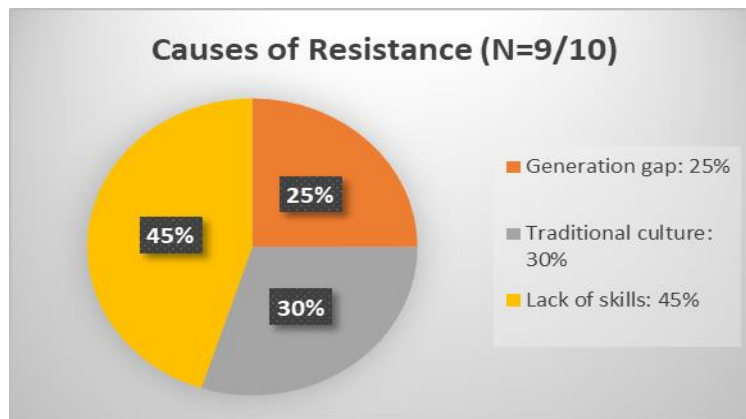
✚ " Social CRM allows us to react in the moment." (P 10)

This evolution marks a shift from a transactional model to a conversational approach to customer relations, focused on proximity, active listening and immediate responsiveness.

**2. Resistance and Circumvention Strategies :** The thematic analysis conducted via NVivo reveals that the transition to social CRM does not only go up against technical or budgetary constraints, but also with real organizational resistance, from multiple sources. These obstacles, which were repeatedly identified in the interviews, highlight deep human and cultural blockages, which are likely to hinder the implementation of S-CRM in the long term.

**Causes of resistance :** Three main categories of resistance have been identified:

Figure 1: Causes of resistance



Source: Nvivo

- **Lack of Skills** : Mentioned in eight out of ten interviews, this difficulty refers to a lack of knowledge of CRM tools, social platforms and digital performance indicators. Several respondents mentioned the lack of training or sufficient awareness of the challenges of social CRM, especially in non-technical operational teams.

*" Many colleagues don't even know that you can manage a customer relationship on Instagram. They get stuck on Excel and phone calls. (P3)*

- **Traditional Cultural**: Six of the ten participants highlighted resistance related to organizational culture, including a low valuation of digital interaction, a preference for traditional methods (physical or telephone), and a sometimes-negative view of social media as a professional channel.

*" We have managers who don't believe in social networks. For them, it's just entertainment, not customer service. (P6)*

- **Generational gap**: Five interviews reveal an implicit opposition between generations, where older employees are reluctant to integrate tools perceived as complex, unstable or non-essential. This divide hinders the intergenerational collaboration necessary for the success of digitalization.

*" Seniors don't even open LinkedIn. They say that it doesn't concern them, that it's not for them. (P1)*

**Circumvention strategies and acceptance levers** : Faced with these obstacles, the organizations interviewed have experimented with different strategies of appropriation and circumvention, some of which are particularly effective.

- **Gradual adoption through experimentation**: Several companies have opted for a gradual deployment of social CRM, starting with one or two pilot platforms (e.g., Facebook or WhatsApp Business), in order to limit initial resistance and allow for iterative learning.

*" We started small. One channel, with one community manager. Then we expanded. (P9)*

- **Cross-training and interdepartmental workshops**: The organization of training sessions involving several departments (marketing, customer service, IT) promotes a shared understanding of the issues, cohesion, and collective ownership of the approach.

*" Once IT teams saw how customers are responded to online, they understood the urgency. (P5)*

- **Strengthening teams by recruiting digital profiles:** To compensate for internal shortcomings, some companies have integrated young and specialized profiles (community managers, data analysts, social media managers), capable of carrying out the project in an operational way and disseminating a digital culture internally.

*" The recruitment of our community manager has changed the game. She trained others, showed how to do it, it demystified digital. (P7)*

Our results highlight that resistance to S-CRM is less related to technology than to the human ability to integrate it into daily practices. The strategies for success do not lie in massive investments, but in a fine management of the human aspect, the pace, and the meaning given to change.

This is in line with the work of Kotter (1996) and Armenakis & Bedeian (1999) on organizational change management, and argues for the introduction of "soft" variables into CRM adoption models, such as digital culture, perceived motivation, or the climate of interdepartmental trust.

**Technical skills: the basis for implementation :** The transition to S-CRM requires technical proficiency in digital tools such as Hootsuite, CRM platforms (Salesforce, HubSpot) or data analysis software.

*" Be proficient in social listening technology (such as Hootsuite, Sprout Social). (P1)*

*" This transition requires technical skills such as mastery of technological tools [...] which was initially refused by the sellers. (P2)*

These skills are a prerequisite for ensuring the optimal use of social media data.

**Soft skills :** Soft skills such as collaboration, stress management or active listening are considered essential to the success of the process.

*" Teamwork is crucial to make this transition a success, active listening and the willingness of employees are also important." (P4)*

*" Agility, team building, stress management [...] are essential for this transformation. (P 9)*

The human factor appears to be central here, both as an initial obstacle and as a driving force for adaptation when properly accompanied.

**Training and support :** Skills development requires a combined strategy of certification training and targeted recruitment of digital profiles, to compensate for internal shortages.

*" We have recruited a specialized community manager." (P1)*

*" External training with firms specialising in digital marketing." (P4)*

These initiatives underscore the need for investment in human capital, beyond technological solutions alone.

**Coding Matrix: Frequency of Themes :** In order to better understand the relative importance of emerging concepts, Table 3 of prevalence was developed based on the frequency of appearance of each theme in the entire corpus.

**Table 2. Theme prevalence table (encoded in NVivo)**

| Rank | Theme         | Occurrences | Synthetic interpretation                                   |
|------|---------------|-------------|------------------------------------------------------------|
| 1    | Marketing     | 12          | Marketing remains at the heart of the social CRM strategy. |
| 2    | Communication | 11          | Two-way communication as the foundation of S-CRM.          |

|    |                       |   |                                                              |
|----|-----------------------|---|--------------------------------------------------------------|
| 3  | Performance           | 8 | S-CRM is strongly linked to improved performance.            |
| 4  | Digital marketing     | 7 | Key competence for the implementation of the transition.     |
| 5  | Resistance            | 7 | Strong presence of internal or cultural obstacles to change. |
| 6  | Customers             | 5 | Focus on customer needs and behaviors.                       |
| 7  | The relationship      | 4 | Strengthening customer relations through social channels.    |
| 8  | Formation             | 4 | Crucial internal skills development.                         |
| 9  | Enterprise            | 7 | The company as a whole is impacted by the migration.         |
| 10 | Engage                | 4 | Customer engagement is a cross-cutting goal.                 |
| 11 | Transition            | 4 | The idea of a gradual and structured change.                 |
| 12 | CRM                   | 3 | Transition from traditional CRM to social CRM.               |
| 13 | Digital communication | 5 | Importance of the strategic use of digital channels.         |
| 14 | Marketing d'influence | 3 | Complementary technique to S-CRM to capture the audience.    |
| 15 | Migration             | 3 | Technological and cultural migration to a new model.         |
| 16 | Process               | 5 | S-CRM as a complex integration process.                      |
| 17 | Soft skills           | 3 | Behavioural skills facilitate change.                        |
| 18 | Technology            | 3 | Digital tools as catalysts for the social CRM strategy.      |
| 19 | Internal resistance   | 4 | Resistances specifically identified internally.              |
| 20 | Benefits              | 3 | Perceived benefits of S-CRM: responsiveness, loyalty, etc.   |

Source: Nvivo

#### The frequency analysis highlights the three dominant themes:

1. Marketing (12 occurrences), followed by communication (11) and performance (8), confirm that S-CRM is designed as a strategic lever for marketing optimization based on customer interaction. Digital marketing (7) and influence (3) are seen as key sub-components of this logic.
2. Two-way communication is at the heart of the process. It reflects the transformation of the role of brands in customer relations, moving from a sender to a full-fledged interlocutor. This is in line with the words of Participant 6:

*" Social CRM is bidirectional, not only can we disseminate information but also interact with our customers."*

3. The themes of "resistance" (7) and "internal resistance" (4) occupy a significant place, pointing to human, technical and cultural obstacles. This is corroborated by several testimonies:

*"The staff refused to allow the people to pass, especially the elderly." (Participant 8)*

4. The recurrent appearance of soft skills (3), training (4) and transition (4) testifies to the need for structured and progressive human support. As Participant 3 states:

*" We need to integrate social CRM in an incremental way [...]. »*

5. Finally, the technological dimensions (CRM, tools, digital, Hootsuite, etc.) although less frequent individually, confirm that the human factor predominates over the technical factor in this transition, in terms of issues and perceived concerns.

The prevalence table shows that S-CRM is not only a technological evolution, but a systemic change, involving transformations in terms of corporate culture, skills and relational posture.

## **V. DISCUSSION**

The results of this research add to the current body of knowledge about how SMEs can manage the intricacies of Social CRM implementation in a fast-changing digital environment. The three key dimensions have been identified, which are dynamic organizational capabilities, sociotechnical alignment, and cultural/appropriation dynamics, and which should be reflected further both theoretically and practically. Foremost, the impact of dynamic organizational capabilities in the sustainable competitive advantage is highlighted by the evidence under situations of digital revolution. It is consistent with the revised perception of dynamic capabilities theory which states that SMEs should no longer merely learn technical skills, but should keep on adapting, reconfiguring, and combining new digital practices (Gonzalez-Varona et al., 2024). Where SMEs have an advantage over large companies is that they are not constrained by heavyweight hierarchies and thus are able to roll out SCRM tools faster. But because they can be so sensitive to resource limitations, it is the ability to learn fast and re-orient oneself strategically which becomes core to survival.

Second, the paper demonstrates that sociotechnical alignment is necessary when implementing SCRM. Technological investments like analytics dashboards, CRM platforms, and AI powered tools are needed but not enough as they have to be accompanied by corresponding social activities. Orlikowski (2000) practice-based view of technology is true as the employees play a key role in determining the manner in which the tools are utilized. In environments where automation is available to substitute rather than support human judgment, firms will endanger the creation of disengaged customers who may find digital interfaces sterile. The matter is that there is a need to strike the balance: scale efficiency through the use of digital instruments and maintain authentic and human-centric interactions. This is a distinctive contribution to the sociotechnical systems theory in the understanding that it elucidates how cultural beliefs and structures of an organization intervene in the enactments of technologies that shape SMEs and not merely the functionality of tools. Third, the organizational culture and dynamics of appropriation comes out as a leading facilitator or an obstacle. In line with Alshammari et al. (2024), SMEs with high employee empowerment to innovate and develop digital skills record better long-term results in SCRM. On the contrary, adopting by risk-averse and hierarchical firms tends to be a problem, which supports the resistance antecedents of skills gaps, generational gaps and established traditions. This result is relevant to the theory of appropriation as it demonstrates that it is the cultural readiness that mediates the process of digital tools incorporation into everyday life.

Theoretically, this paper contributes a SCRM literature by filling stylized gaps among three research strands including dynamic capabilities, sociotechnical approaches as well as appropriation studies. Previous publications have researched these streams in isolation but the combination helps to take a more holistic view of how SMEs practice SCRM. In practice, the outcomes point to the necessity of managerial perception of SCRM adoption as not a technological endeavor but as a change of the organization in terms of investment in digital literacy, empowerment, and cultural openness. Further, the findings also suggest that SCRM must be seen as a continuous process as opposed to single decision on adoption. They have to continuously adapt since digital tools and the expectations of the customers change at a fast pace. This means effective SCRM initiatives ought to have feedback loops, periodic experimentation and means of organizational learning. Future studies could examine the changing nature of these feedback loops over time, and may do so with a longitudinal or cross-industrial/regional framework. Altogether, the discussion points to the fact that the adoption of SCRM in SME is a multidimensional phenomenon. To accomplish its potential, it demands dynamic capability building, sociotechnical and cultural preparedness. In pointing these interdependencies, this paper not only adds value to academic discourse but also to management platforms a way forward that SMEs have to follow to succeed in the form of a more digitalized and customer-emphasizing economy.

## V. CONCLUSION

This paper has taken the dynamics of Social CRM (SCRM) adoption in SMEs on an integrative approach including an integration of dynamic capabilities, sociotechnical systems, and technology appropriation. We find in our analysis that, technological investments are not enough: sustainable SCRM performance is achieved when digital means are implemented within the right organizational routines, when human machine interaction is made available, and when cultures invite experimentation, learning and adaption. Briefly, SCRM can be learned as a living socio-technical facility, not an independent software installation.

This paper contributes to the body of SCRM research in four streams. To begin with, it combines capability theory with a sociotechnical practice perspective, outlining how the implications of the processes of sensing (social listening, analytics), seizing (co-creation, content activation, omni-channel response), and reconfiguring (workflow redesign, data governance) are mutually sustaining micro-bases within SMEs. Second, it blows up the appropriation theory to SCRM by specifying a staged process of appropriation trialing move  $\rightarrow$  local adaptation move  $\rightarrow$  routinization move  $\rightarrow$  scale move and by describing the conditions of culture that catalyze that journey or impede it. Third, it brings forth the concept of ambidextrous SCRM, which helps to better understand what along the automation-human judgment-empathy spectrum lies the aspect on which it supplements rather than replaces human judgment and empathy. Fourth, it adds an SME flavor by demonstrating how resource constraints intensify the relevance of lightweight integration, module tooling and role re-design to release the value of SCRM.

### The results convert to a practical playbook to the practitioners:

- ✚ Build micro-foundations (a) institutionalize data stewardship, social care with overt ownership; (b) train front-line workers in digital fluency and conversational empathy; (c) standardize closed loop processes (listening  $\rightarrow$  triage  $\rightarrow$  response  $\rightarrow$  learning); (d) embrace a balanced scorecard that brings relational to economic results (sentiment, engagement depth in CLV, retention, service cost).
- ✚ Build human-in-the-loop automation: scale through chatbots and recommendation engines, but maintain paths of escalation and quality checks by trained agents; write-back tone-of-voice and exceptional rules to preserve authenticity.
- ✚ Take a phased launch: begin on a lighthouse ride (e.g. service recovery or onboarding), design playbooks, and roll off channels; attach SCRM connectors over low-code to ERP/e-commerce to give a unified view of the customer.
- ✚ Bake learning: investigate cases and content retros on a monthly basis; develop and store pattern libraries of effective interaction; reward experimentation to lessen resistance due to skills gaps and conventional cultural expectations.

The study is also qualitative and SME concentrated, and this can be potentially done in a limited way regarding industry and institutional ambiances of the generalizability. Future research can: (1) repeat the proposed sociotechnical-capability model using larger samples using PLS-SEM or multi-level models; (2) create longitudinal studies to track changes in appropriation stages and the feedback loops of performance; (3) compare B2B and B2C contexts as well as cross-country contexts to explore regulatory and cultural contingencies (e.g., data privacy regimes); (4) explore emergent technologies including generative AI, customer data platforms, and immersive interfaces, and their implications in governance; and (5) develop validated scales for ambidextrous SCRM and for sociotechnical alignment in customer-facing processes.

Taken together, the results reposition SCRM as an organizational performance that is sociotechnically performative, culturally reinforced, and dynamically regenerative. Companies that develop this ability directly (via investment in an integration of technologies and human judgment and indirectly (via continuous learning established in corporate culture) are the ones likely to turn digital transformation into customer-focused, sustainable, growth.

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## Annexes

### Appendix 1. Semi-structured Interview Guide

**Introduction:** This interview is part of an academic research project focusing on the adoption of Social CRM and the competencies required for its successful implementation in organizations. Your insights will help us better understand practices, challenges, and enablers associated with integrating digital customer relationship management tools, particularly those applied to social media (listening, customer engagement, personalization, etc.).

There are no right or wrong answers: we are interested in your personal experience and perceptions. The interview will last approximately [30minutes], and all responses will remain strictly confidential.

### Themes and Questions

#### 1. Professional background

- Could you describe your role in the company and your experience with CRM / Social CRM?
- How long has your company been using Social CRM?

#### 2. Perceptions and differences between traditional CRM and Social CRM

- What do you consider to be the main differences between traditional CRM and Social CRM?
- What objectives or benefits is your company seeking through Social CRM adoption?

#### 3. Technical competencies

- What technical skills are necessary to support Social CRM implementation (e.g., knowledge of social platforms, data analytics tools, CRM software)?
- Were these competencies already available in your team, or did they need to be developed?

#### 4. Behavioral competencies (soft skills)

- Which behavioral skills proved essential in this transition (adaptability, creativity, communication, collaboration...)?
- How were these skills developed or enhanced (training, recruitment, coaching)?

#### 5. Challenges and obstacles

- What forms of internal resistance (cultural, organizational, or skills-related) have you observed?
- What were the main obstacles, and how were they overcome?

#### 6. Support and development strategies

- What initiatives or support mechanisms were implemented to assist employees (training, coaching, organizational changes...)?
- Did you personally benefit from any specific program?

#### 7. Strategic competencies and future perspectives

- What strategic competencies do you consider crucial for the future success of Social CRM?
- What advice would you give to marketing managers or executives undertaking this transition?

### Appendix 2. Word Cloud



Source : Nvivo