CRM strategies within small and medium family-owned businesses: a multiple case study

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Abstract: Building and maintaining close, cooperative and long-term relationship with customers is essential in the current era of intense competition. Therefore, this study examines how family-owned small and medium-sized enterprises (SMEs) adopt and implement customer relationship management (CRM) strategies, focusing on their unique dynamics, including familial values, financial independence, and long-term orientation. Through a qualitative analysis of three Moroccan family SMEs, the research highlights how these businesses leverage relational strengths and social capital to build trust and loyalty while facing challenges in scalability and innovation. The findings emphasise the need for tailored CRM tools, digital transformation, and intergenerational collaboration to balance tradition with modernisation. Practical recommendations include involving younger generations, formalising customer data, and aligning CRM strategies with long-term business goals. This work fills a research gap on CRM adoption in family SMEs and provides actionable insights for enhancing their competitive edge.

Keywords: CRM strategies; family business; customer retention; sustainability; transmission; digitisation; familiness; social capital.

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1   Introduction

The scale of contemporary changes – spanning globalisation, economic recovery, and intensifying global competition – compels managers to transform their organisations, as well as their marketing and sales strategies, in order to enhance performance (Supizet, 2002). The central challenge for any business lies in retaining existing customers while concurrently striving to acquire new ones within an increasingly aggressive competitive environment characterised by volatile and demanding customer behaviour.

In response to these challenges, organisations, particularly family small and medium-sized enterprises (SMEs), which represent a significant component of global economies (Ližbetinová et al., 2019), adopt a range of strategies and tools under the umbrella of customer relationship management (CRM) to ensure their survival in an evolving market landscape. This has resulted in a heightened focus on CRM within both academic and professional circles in recent years (Bellaaj, 2014). However, it is noteworthy that there remains a dearth of research specifically examining CRM practices within SMEs (Ambroise and Prim-Allaz, 2015) and, more notably, within family-owned SMEs (Cooper et al., 2005; El Hail and El Koraichi, 2024), particularly with regard to the distinctive characteristics and resources that these businesses possess.

Despite this gap, family SMEs continue to dominate the economic landscape in numerous countries worldwide (Kenyon-Rouviniez and Ward, 2004). As a result, the analysis of their managerial strategies holds a central place in the scholarly literature addressing this category of business. A substantial body of literature, predominantly drawing on agency theory (Charlier and Lambert, 2009), stewardship theory (Le Breton-Miller and Miller, 2009), and social capital theory (Elkhalfaoui and Mokhtari, 2017), has been mobilised to explore and evaluate the performance of family businesses (FBs). However, relatively few studies have delved into the role of CRM within FBs, particularly when accounting for their unique features and attributes.

This work is located within this perspective and aims to address the following question: 'How do the unique characteristics and specific traits of family-owned SME shape the adoption and implementation of CRM strategies?'

To answer this, the research adopts a theoretical and conceptual framework that first examines CRM definitions and strategies before delving into a literature review on its application within FBs. Despite the wealth of research on FBs, empirical studies that connect their distinctive features to CRM adoption remain limited. To contribute to this understudied area, the study presents a qualitative analysis of three Moroccan family SMEs, focusing on how their familial dynamics, financial independence, and long-term aspirations influence CRM adoption and implementation. By examining their strategies, challenges, and opportunities, this research aims to provide both theoretical insights and practical recommendations, bridging the gap between the relational strengths of family SMEs and the demands of modern CRM in a competitive global market.

2   Theoretical background

To further understand how CRM strategies can be effectively implemented within family-owned SMEs, it is essential to first examine the theoretical underpinnings of CRM. This theoretical background will provide a clearer understanding of CRM's evolution, its key strategies, and how these can be applied across the customer lifecycle.

By reviewing CRM definitions and strategies, we will set the foundation for analysing how the unique characteristics of FBs, such as their relational focus, customer orientation, and social capital, influence CRM adoption and implementation.

2.1 CRM: a multidimensional concept

In management science, the concept of CRM offers a particularly interesting framework and field of analysis, given its position at the intersection of three research domains: relationship marketing, information systems, and strategic management. However, researchers do not agree on a unified definition of CRM (Nasır, 2015). The conceptual framework of CRM remains challenging to circumscribe due to the numerous, often divergent definitions proposed (Payne and Frow, 2005).

Historically, the term 'CRM' first emerged in the 1990s within the information technology industry. CRM is frequently used by professionals and consultants to denote software applications that facilitate interactions and relationships between a company and its customers. Consequently, some definitions narrowly confine the concept to a technological tool. A literature review conducted by Zablah et al. (2004) reveals 45 definitions that all revolve around four key elements: processes, philosophy, strategy, and technology. Table 1 presents a chronological evolution of CRM definitions, highlighting shifts in focus, scope, and technological integration over time.

The different definitions of CRM reveal a lack of consensus on its core elements, encompassing diverse perspectives that range from tactical (automating marketing tasks) to technological (utilising IT solutions) to strategic (building long-term, valuable customer relationships) (Payne and Frow, 2005). Notably, the way CRM is understood significantly influences how companies design and implement its practices (Bellaaj, 2014).

Note that CRM has transitioned from a primarily strategic process to a technology-driven approach, integrating data and analytics tools to enhance customer relationships and align with modern business challenges, emphasising personalisation, digitalisation, and value optimisation (Pynadath et al., 2023). Advancements in IT, social media, and data analytics have played a pivotal role in this transformation. Technology has become central to CRM, reshaping how businesses interact with their customers. This evolution has shifted CRM from general customer management to a more personalised and socially integrated approach, prioritising tailored interactions and leveraging social media for deeper engagement.

Furthermore, CRM's scope has expanded significantly. It now encompasses eCRM, social CRM, and advanced technological tools, reflecting its growth into a multidisciplinary and technologically sophisticated practice. These developments underscore CRM's adaptability and its crucial role in driving customer-centric innovation (Ledro et al., 2022).

Having established a clear understanding of CRM and its role in fostering meaningful customer interactions, it is essential to explore the strategies that bring this concept to life.

Table 1   Summary of the main CRM definitions

Authors	Year	Definition
Parvatiyar and Sheth	2001	CRM is a strategic process to acquire, retain, and partner with key customers, integrating marketing, sales, service, and supply chain functions to enhance efficiency and deliver value.
Piccoli et al.	2003	CRM is an interactive process between a company and its customers, designed to understand customer profiles and proactively meet their needs with targeted actions.
Payne and Frow	2005	CRM, narrowly, involves deploying customer-focused technologies; broadly, it is a holistic, customer-centric strategy to create mutual value for both the business and its customers.
Thompson	2007	CRM is a strategy that personalises products, pricing, communication, and channels to deliver tailored value, manage customer segments, and enhance the overall customer experience.
Buttle	2009	CRM is a core strategy that integrates processes, functions, and networks to deliver value to target customers profitably, driven by quality data and advanced IT.
Hung et al.	2010	CRM is a strategic process that integrates marketing, sales, customer service, and supply chain functions to acquire, retain, and build partnerships with key customers, delivering exceptional value to both the company and its clients.
Kumar and Reinatz	2012	CRM is a strategic process to identify and engage profitable customers, aiming to maximise their current and future value to the company.
Siu	2016	CRM is an interactive process to balance company investment and customer satisfaction, maximising benefits for both.
Kampani and Jhamb	2020	E-CRM leverages digital tools to identify, maintain, and enhance long-term customer relationships, optimising interactions and boosting satisfaction.
Lobato et al.	2020	CRM is perceived as a multidisciplinary approach integrating social technologies to manage customer interactions, aiming to enhance engagement and collaboration.
Jami Pour and Hosseinzadeh	2021	Social CRM is defined as an emerging paradigm in the e-business environment, combining the capabilities of social media with traditional CRM software to better engage customers.
Jabado and Jallouli	2023	CRM is a strategic tool that leverages technology and data analytics to manage customer interactions, automate processes, and enhance marketing decisions.

2.2   *Key CRM strategies from acquisition to loyalty and beyond*

CRM strategies translate the principles of CRM into actionable tactics, enabling businesses to effectively manage customer relationships and achieve their goals. Below, a summary of the main CRM strategies according to the customer lifecycle will be outlined.

2.2.1 Acquisition strategies

These strategies are designed to identify and attract potential prospects, with the ultimate goal of converting them into loyal customers. Examples include:

- Conduct a thorough analysis of the customer database to identify the typical customer profile and implement targeted actions such as advertising, public relations, trade shows, direct mail, newsletters, social media, cold calls, and word-of-mouth strategies (Lynch, 2013).

- Focus on satisfying and retaining existing customers, encouraging them to become advocates for the company by recommending its products and services (Buttle, 2009).

- Encourage customers to try products by offering promotions, special deals, and other incentives (Wirtz and Chew, 2023).

- Utilise lead management through digital channels to identify, attract, and recruit new customers (Nasır, 2015).

- Leverage digital channels for efficient lead management to attract and recruit new customers, expanding the customer base (Gupta and Khan, 2024).

- Integrate AI into CRM to personalise interactions, predict customer needs, and boost engagement, enhancing customer acquisition (Ledro et al., 2022).

2.2.2 Retention strategies

It encompasses the tactics and strategies aimed at retaining customers after they have been acquired. In an increasingly competitive environment, where customer turnover is high, companies must implement effective retention strategies, such as:

- Protect relationships with important clients by constructing exit barriers, such as presenting advantages, privileges and advantages reserved for clients (Buttle, 2009).

- Deliver superior quality service and quality relationships as part of the operational excellence strategy (Hussein et al., 2024).

- Analyse the causes of customer defections to solve and avoid them and to anticipate loss and departure of customers (Nasır, 2015).

- Segment and target customers to present customised products and services tailored to each segment and individual customer, while personalising offers and customer relations to enhance satisfaction and differentiate from competitors.

- Utilise customer databases to analyse purchasing behaviour, enabling informed decisions and targeted retention strategies (Kumar et al., 2023).

- Encourage satisfied customers to act as advocates, boosting acquisition and retention through referrals (Hussein et al., 2024).

- Establish a multi-channel contact strategy to stay in permanent contact with customers (Helfer and Michel, 2006).

2.2.3 Development and loyalty strategies

These strategies focus on enhancing customer relationships by fostering their progression up the loyalty pyramid and encouraging increased spending. Key actions include:

- Integrate AI into CRM to streamline customer interactions, enhance service quality, boost revenue, and foster customer satisfaction and loyalty through personalised marketing, predictive analytics, and sentiment analysis (Leelavathi et al., 2024).

- Continuously analysing complaints and measuring customer satisfaction (Kim and Lim, 2021).

- Implementing loyalty programs while understanding the factors that strengthen customer loyalty (Kim et al., 2021).

- Encouraging higher customer spending by identifying up-selling and cross-selling opportunities (Buttle, 2009).

Over time, the relationship between the company and the customer deepens. Satisfied customers tend to increase their spending, purchasing at higher profit margins rather than discounted prices (Buttle, 2009). Additionally, their loyalty makes them less receptive to competitors' solicitations and promotional offers due to their strong attachment to the company.

2.2.4 Win back strategies

It refers to a set of actions designed to re-engage customers who have previously disengaged or churned from an enterprise. These strategies aim to rebuild relationships with former customers, addressing the reasons for their departure and incentivising them to return as loyal customers. Also, customer defection can be classified into two types: unavoidable and avoidable. For avoidable defection, companies implement various strategies to prevent customer loss, including:

- Anticipate defection by analysing and processing complaints.

- Strengthen emotional bonds by enhancing affective customer experiences, boosting satisfaction, loyalty, and retention (Gao et al., 2023).

- Analyse customer data to identify patterns indicating potential defection and take proactive measures to retain these customers (Das and Kondamudi, 2023).

Note that companies should develop win-back strategies to regain lost customers, particularly those who are strategically significant. Additionally, when dealing with unprofitable or less profitable customers, the company can apply two approaches:

- Implement a cost reduction strategy for unprofitable customers or those requiring expensive services by directing them to lower-cost channels (Person, 2013).

- Adopt an abandon strategy by ending the relationship with customers who show no significant contribution to the business (Buttle, 2009).

While CRM strategies across the customer lifecycle provide valuable frameworks for businesses seeking to manage and grow customer relationships, FBs face distinct challenges when implementing these strategies. The following sections will introduce the

family SMEs and explore how the unique characteristics of FBs – such as their customer orientation, family values, and resistance to change – affect their adoption of CRM systems. It will highlight both the opportunities and obstacles they encounter in integrating CRM strategies, especially in the context of digital transformation.

2.3 Definition and characteristics of family SMEs

The small and medium enterprise is widely recognised as a socio-economic entity, but its precise definition remains a subject of debate among academics, practitioners, and economists (Moulai, 2017). This lack of consensus arises from the absence of a universal definition in economic discourse, with the criteria for defining SMEs varying significantly across sectors, economies, and countries (Karim, 2016). As such, the characteristics of SMEs are not universally fixed, and their classification often depends on local and contextual factors. Despite these variations, SMEs are generally understood through two primary approaches that provide a multifaceted understanding of SMEs, capturing both their structural characteristics and the unique organisational dynamics that differentiate them from larger businesses:

- Quantitative approach which relies on measurable criteria such as turnover, size, and the number of employees, offering a standardised way to categorise SMEs. These parameters are often used by governments and international organisations to define and compare businesses across different regions and industries.

- Qualitative approach which focuses on non-measurable factors such as the centralisation of management, the degree of managerial involvement, and the decision-making power of owners or founders (Torres, 1997). These qualitative elements are particularly important in understanding the internal dynamics of SMEs, which often operate with a more personalised and flexible management structure compared to larger corporations.

Similarly, the concept of 'FB' remains ambiguous and elusive due to the diversity of definition criteria and the varying perspectives from which it can be approached. Nevertheless, it is possible to highlight the key dimensions that define FBs. A FB can be understood as an entity situated at the intersection of three influential domains: 'the family', 'the business', and 'the ownership' (Gersick et al., 1997). These overlapping circles reflect the unique and interconnected nature of FBs, where the dynamics of family influence are inextricably linked to business operations and ownership structures.

The definitions of FBs, whether based on a single criterion or multiple criteria, generally emphasise different combinations of the core elements outlined in Table 2. These elements serve to differentiate FBs from other types of organisations (Allouche and Amann, 2000; Missonier and Gundolf, 2017).

By examining these key criteria, a clearer picture emerges of what constitutes a FB, recognising its complexity and the dynamic interplay between family, ownership, and business management.

In Morocco, an SME is defined as "a company managed or administered directly by individuals who are the owners, co-owners, or shareholders, and in which no more than 25% of the capital or voting rights are held by a company or several companies that do not meet the definition of an SME" (Law No. 53-00 of 2002).

Table 2   Defining criteria for FB

Criteria	*Definition*
Control of capital by the family	The family holds a significant share of ownership or control over the capital, often ensuring that decisions regarding business direction remain within the family circle.
Family influence on management	This criterion highlights the direct or indirect role the family plays in the management and governance of the business, where family members often hold key leadership positions and shape the strategic direction of the company.
Family/business interaction	The interconnection between family life and business activities is another defining characteristic. In family businesses, personal relationships and family values frequently influence business decisions, creating a unique culture that integrates both personal and professional spheres.
Succession and continuity	A defining feature of family businesses is the planned or actual transmission of the company to future generations. This aspect underscores the long-term vision of family businesses, with the intention of preserving both ownership and management within the family over time, ensuring the continuity of the enterprise across generations.

As for the definition of a FB, the General Confederation of Enterprises in Morocco (CGEM, 2008) proposes the following:

> "The only distinction between businesses is seniority: they are born as SMEs, become family businesses when the second generation joins the management team, and then become patrimonial when their shareholding is distributed within the family through succession. These businesses are characterized by the significant weight and influence of the personal values and principles of the family leader or founder, with safeguarding the overall interests of the family being of equal or sometimes greater importance (in practice) than economic rationality."

In our study, we opt for the following definition: "The Family SME is a company that achieves a turnover of less than 75,000,000 Dirhams whose workforce does not exceed 200 employees and capital is mainly held by the same family involved, more or less, in managerial functions."

2.4   *CRM in FBs: navigating challenges and opportunities*

FBs possess a unique blend of strengths and challenges when it comes to adopting CRM strategies. While they often excel in building strong customer relationships through personalised service and long-term commitments, integrating CRM tools can be a complex endeavour. This review explores the key factors influencing CRM adoption in FBs, drawing upon existing research and highlighting the critical role of digital transformation in this process.

One of the primary challenges stems from the inherent conservatism often observed in FBs. A reluctance to embrace change and innovation, driven by factors such as limited technological expertise, insufficient marketing skills among family members, and a perception of CRM investments as risky, can hinder their adoption of these tools (Duran et al., 2016; El Hail and El Koraichi, 2024). This conservatism can manifest in a

preference for traditional, often informal, approaches to CRM, relying heavily on personal relationships and tacit knowledge (Danes et al., 2009). However, the increasing importance of digital technologies necessitates a shift in approach. The involvement of younger generations, with their greater digital literacy and familiarity with emerging technologies, can significantly accelerate the digital transformation of FBs (Del Vecchio et al., 2024). This younger generation can bring fresh perspectives and drive the adoption of innovative CRM solutions, such as AI-powered systems that can enhance operational efficiency, improve decision-making, and identify new market opportunities (Chatterjee et al., 2021). Furthermore, the unique characteristics of FBs, often referred to as 'familiness', can both facilitate and hinder CRM adoption. While strong family values and a shared sense of purpose can foster trust and long-term relationships with customers, they can also create resistance to change and a preference for maintaining established, often informal, practices. The role of social capital, deeply embedded within family and professional networks, is another crucial factor. This social capital can facilitate information flow, reduce transaction costs, and foster cooperation, all of which are essential for successful CRM implementation (Arregle et al., 2007). However, maintaining and leveraging social capital during generational transitions can be challenging, particularly if successors fail to integrate CRM tools that can effectively capture and utilise the valuable relationships built by previous generations (Ashley-Cotleur et al., 2013).

The strong customer orientation of FBs, characterised by a deep understanding of customer needs and a commitment to personalised service, provides a solid foundation for successful CRM implementation (Mediano et al., 2019). However, further research is needed to quantitatively analyse the impact of customer orientation on CRM adoption and its influence on FB performance. Moreover, the family identity of FBs plays a significant role in shaping consumer behaviour. Highlighting their family values through branding and communication strategies strengthens customer trust and loyalty (Köhr et al., 2021; Zanon et al., 2019). CRM tools can be effectively integrated to enhance these relational dimensions by enabling more targeted and personalised customer interactions, further strengthening the bond between the FB and its clientele.

In conclusion, this review has outlined both the strengths and challenges that FBs face in adopting and implementing CRM strategies. While their strong relational focus, customer orientation, and social capital create a solid foundation for CRM integration, obstacles such as conservatism, resistance to change, generational dynamics, and the need for digital transformation pose significant challenges.

Despite the growing relevance of CRM solutions, there remains a notable gap in understanding how the unique characteristics and specific traits of FBs – such as their 'familiness', generational transitions, and customer-focused strategies – shape the adoption and implementation of CRM strategies.

This study aims to bridge this gap by exploring the following research question: 'How do the unique characteristics and specific traits of family-owned SME shape the adoption and implementation of CRM strategies?'

Addressing this gap is crucial for unlocking the full potential of CRM in FBs and ensuring their competitiveness in an ever-evolving business environment. To thoroughly examine how family-owned SMEs influence CRM adoption, a rigorous methodology has been employed. The next section will provide an overview of the research approaches, data collection methods, and justifications behind the chosen methodology.

3   Methodology

To thoroughly explore the CRM strategies adoption within family SMEs and how their unique characteristics influence this process, a rigorous methodology was employed. This section outlines the research approaches adopted, the methods of data collection and analysis, and the justifications for the methodological choices made.

3.1   Research objectives and strategy

Defining the objectives of the study is crucial, as it establishes the foundation for the entire research process, from planning and data collection to analysis and interpretation, ensuring that the study is focused, efficient, and aligned with the intended outcomes. This phase involves developing a list of guiding questions, from which the units of analysis are identified. The key objectives of our study are as follows:

- Identify the main CRM strategies within Moroccan family SMEs.

- Study the influence of their characteristics and specificities on the adoption and implementation of CRM strategies.

In order to achieve these objectives, an exploratory research approach seems fitting to gain deeper insights. Moreover, an inductive strategy is particularly necessary when studying a relatively under-researched area (Eisenhardt, 1989). Therefore, the multiple case study method was selected to gain deeper insights into how family SMEs adopt and implement CRM strategies, as well as how their familial characteristics influence this process. These cases were used descriptively to illustrate the CRM adoption process within family SMEs and to better understand the role of family dynamics in shaping this process (Yin, 2009).

Note that the goal is not to establish causal links or make broad generalisations. Rather, the inclusion of multiple cases allows for the identification of converging and diverging elements (Pires, 1997; Bickman and Rog, 2009), providing a more comprehensive understanding of CRM adoption across different family SMEs and how the unique characteristics of FBs influence CRM strategies.

This approach aligns well with the research objectives, as it helps to explore the 'how' behind the adoption and implementation of CRM strategies (Benarfi, 2006). Furthermore, the case study method is particularly valuable in organisational studies and widely used in research on FBs (De Massis and Kotlar, 2014).

3.2   Sampling

Convenience sampling was used in this project. This sampling method allowed the researchers to investigate typical cases that are likely to replicate or extend emergent theory (Eisenhardt, 1989).

From a theoretical perspective, the three family SMEs, A, B, and C, were selected for their diversity in terms of activity sector, management style, and generational transition phase, enabling a comprehensive and nuanced analysis of CRM strategy adoption across different contexts. This diversity facilitates the comparison of the impacts of family dynamics, intergenerational control, and specific strategies on CRM adoption. Furthermore, these three cases allow for the identification of convergences and

divergences in adoption processes, enriching the overall understanding of the phenomenon under study.

Note that in the context of an exploratory and inductive study, focusing the analysis on a limited number of cases is crucial for conducting a thorough and detailed investigation. Examining three cases enables the development of rich, nuanced conclusions while preserving the depth and rigor of the analysis.

From a technical perspective, these three cases were chosen because they demonstrated a strong willingness to collaborate. The cases are accessible at any time, with managers consistently open and receptive to collaboration. Additionally, these cases were selected due to the unusual opportunities they present for research access (De Massis and Kotlar, 2014).

3.3 Data collection and analysis

Primary data were collected using a structured interview guide during semi-structured interviews. Given the specificity of the research focus, respondents were selected based on the principle that information is best obtained from individuals directly involved in the phenomenon under study (Saunders, 2012). Consequently, interviews were conducted with the managers of the selected family SMEs. The interview guide was meticulously developed to align with the study's objectives and included themes addressing CRM strategy adoption, intergenerational dynamics, and specific challenges faced by FBs. This interactive method proved highly effective, allowing participants to share in-depth experiences and rich perspectives. It facilitated the exploration of sensitive topics and enabled a flexible approach to uncover unforeseen themes (Thiétart, 2014). The semi-structured format provided the necessary balance between systematic inquiry and adaptability, ensuring the collection of detailed and nuanced information. Table 3 summarises the main topics addressed during the interviews.

Table 3 Interview guide

Themes		Questions
Respondent profile		Introduce yourself: Name, role in the company, connection to the founding family, years spent in the company, academic background, professional career, tasks, and responsibilities.
Company overview	1	How long has your company been established?
	2	What is your main activity?
	3	What is your sector of activity?
	4	Do you have international operations?
	5	What is the total number of employees in your company?
	6	Do you predominantly work with individual or professional clients?
	7	How is the current evolution of your sector of activity?
Identification of the family nature of the SME	1	What proportion of the capital is held by family members?
	2	How many family members are involved in the management?
	3	What positions are held by family members?
	4	How many successions have occurred since the company's creation?

Table 3   Interview guide (continued)

Themes		Questions
Perception of CRM	1	What does CRM mean to you?
	2	How important is CRM in your company's strategy?
Adoption of CRM	1	What tools or systems do you use to manage customer relationships?
	2	What are the main objectives of your CRM?
	3	What are your strategies for acquiring new customers?
	4	What are your strategies for retaining customers?
	5	What are your strategies for customer loyalty?
Factors influencing the adoption of CRM strategies	1	Based on your experience, what factors influence the adoption and implementation of CRM strategies in your company?
	2	What are the main challenges or obstacles related to these strategies?
	3	Do family members influence your CRM-related decisions? If so, how?
	4	How are family values reflected in managing customer relationships?
	5	How do the inherent characteristics of family businesses affect your CRM strategies?
Evaluation and future perspectives	1	What do you see as the strengths of your current CRM strategy?
	2	What areas for improvement do you identify?
	3	Do the implemented CRM strategies have a measurable impact on your company's performance? If so, how?
	4	What are your projects or priorities for CRM in the coming years?
	5	Do you plan to integrate more technologies or AI-based solutions?

The contextual information of the interviews, including the date, location, duration, mode, participants, and other logistical aspects are summarised in Table 4.

Table 4   Interview details overview

Interview details	Company A	Company B	Company C
Date	October 6, 2021	October 24, 2021	November 12, 2021
Location	Company's retail shop	Company's manufacturing facility.	Company's headquarters.
	El Jadida	Rabat	Casablanca
Duration	2 hours and a half	1 hour and a half	2 hours
Participants	Founder and CEO	Managing Director	CEO
Language used	Arabic	Arabic and French	Arabic and French
Interview environment	Casual setting, in the store's office	Professional, in a conference room	Professional, in the CEO's office

Secondary data were extracted from the internal documents of the studied SMEs, including annual reports and CRM-related records. This complementary data source provided additional insights into the companies' CRM practices and their contextual factors. The data collected during the interviews were meticulously recorded in Microsoft Word, manually coded, and thematically organised. This organisation formed the

foundation for thematic analysis, a qualitative method known for its ability to interpret complex and rich textual data (Braun and Clarke, 2006).

To enhance the reliability of the findings, a comparative analysis was conducted. This method highlighted both convergences and divergences in the participants' perspectives on CRM adoption and its integration within the unique context of family SMEs. The comparative approach proved particularly effective in shedding light on the influence of intergenerational control and varying managerial approaches on strategic decision-making. To ensure the validity and robustness of the study, data triangulation was employed. This involved cross-referencing information gathered from the interviews with the secondary data obtained from internal documents, ensuring cross-validation of findings and reducing interpretative biases (Patton, 2014). Additionally, participant validation, or 'member checking', was implemented to confirm the accuracy and authenticity of the perspectives represented in the results (Candela, 2019). This rigorous methodological approach ensured a comprehensive, reliable, and transparent exploration of the dynamics influencing CRM strategies adoption in family SMEs.

4 Results

The interviews conducted with the three companies provide valuable insights into their CRM strategies, organisational characteristics, and the influence of family dynamics on their decision-making processes. The results presented below offer a structured analysis of the key themes explored during the interviews.

4.1 Presentation of the studied cases

Firstly, the characteristics of the three studied cases are presented, focusing on key aspects such as sector of activity, company size and age, generational transition, family ownership structure, degree of family involvement, and approaches to innovation and digitisation. These details, summarised in Table 5, offer a comparative overview of the companies' contexts and profiles.

4.2 CRM tools and strategies within the studied cases

The CRM strategies employed by the companies, categorised into acquisition, retention, development, loyalty, and win-back strategies, were analysed in depth. The findings reveal variations in the adoption and execution of CRM initiatives, significantly influenced by the familial nature of these businesses, their resource constraints, and their strategic priorities. These strategies are summarised in Table 6, highlighting both traditional and innovative approaches.

To conclude, this section provides a clear understanding of the unique contexts of the studied companies and their family-driven dynamics. This overview establishes a foundation for examining how their distinct characteristics influence the CRM tools and strategies they employ, paving the way for the detailed analysis presented in the discussion section.

Table 5   Profile and key features of the studied companies

Criteria	Company A	Company B	Company C
Respondent profile	• Founder and CEO. • Bachelor's in business administration. • 6 years in the company.	• Managing director. • Second generation, • 15 years in the company, master's in industrial engineering, • Oversees production and generational transition.	• CEO. • Second generation, • 5 years in the company. • MBA in technology management. • Oversees strategy, innovation, and operations.
Company overview	• Founded 6 years ago. • Retail sector. • Small company. • No international operations. • 14 employees. • Individual customers. • Sector is competitive but steady.	• Established 25 years ago. • Manufacturing sector. • Medium-sized company. • No international operations. • 84 employees. • Professional clients. • Evolving demand.	• Founded 32 years ago. • IT sector. • Medium-sized company. • Serves morocco and neighbouring countries. • 52 employees. • Professional clients. • Rapidly growing.
Family nature and involvement	• 100% family-owned. • 2 family members in management (founder and spouse). • No successions. • Highly centralised management. • Decisions made by the founder.	• Majority-owned by the same family. • 4 family members in management (CEO, operations, finance, Sales and marketing). • One generational transition underway. • Shared management	• Majority-owned by the same family. • 3 family members in management (CEO, strategy head, CFO). • One generational transition completed. • Decentralised management. • Strong involvement of the new generation
Innovativeness/ digitisation	Little CRM innovation, traditional management.	Attempts at CRM innovation, transformation process underway.	Innovative CRM approach and active digital transformation.

5   Discussion

The study highlights how the unique characteristics of family-owned SMEs significantly influence their adoption and implementation of CRM strategies. These traits – rooted in family dynamics and values – shape decision-making processes, resource allocation, and CRM integration. Key themes such as financial independence, recruitment challenges, familiness, flexible management, long-term vision, and social capital illuminate the nuanced approach of family SMEs toward CRM adoption.

Table 6 Comparative analysis of CRM tools and strategies in the studied cases

Themes	Company A	Company B	Company C
CRM perception	CRM is about managing customer relationships and ensuring satisfaction. CRM is not yet a formalised strategy due to limited resources and a reliance on traditional methods. "For me, CRM is about staying connected with customers and ensuring they come back. I haven't formalized a CRM strategy yet because we rely on traditional, personal interactions."	CRM is seen as a tool to manage client relationships, improve satisfaction, and adapt to evolving demand. Efforts to adopt CRM are ongoing and gradually improving. "CRM is a system for managing data and improving customer satisfaction. It's an important tool that we are gradually adopting to improve our business processes."	CRM is central to the company's strategy, focusing on personalisation, innovation, and growth. Technology is leveraged to support proactive engagement with professional clients. "CRM is central to our strategy because it allows us to personalize our services and anticipate client needs. It's the key to our growth and client retention."
CRM tools	Manual methods and Excel sheets are used to track customer data. CRM strategies focus on maintaining satisfaction and building personal relationships. "We use manual methods to track customer preferences and rely heavily on personal interactions."	CRM software and Excel are used, with a focus on customer retention, satisfaction, and acquisition. "Our goal is to retain clients by making them feel like part of the family while ensuring professional excellence."	Advanced cloud-based CRM with AI tools is utilised for acquisition, retention, and personalisation. "Our CRM allows us to identify and meet client needs proactively."
CRM strategies	*Acquisition*: Rely heavily on personal and professional networks, word-of-mouth, and social media to attract customers. *Retention*: Develop close relationships with customers, directly resolve issues, and offer personalised service. *Win-back*: Reconnect with inactive customers through personal follow-ups and personalised offers.	*Acquisition*: Organise factory visits and send samples to build trust with professional clients. Rely heavily on personal and professional networks, and social media to attract customers. *Retention*: Offer discounts for bulk orders and customise products to meet client needs. *Win-back*: Use special offers to regain inactive clients and strengthen ties.	*Acquisition*: Digital marketing, webinars, and networking are used to attract clients in Morocco and neighbouring countries. *Retention*: Predictive analytics help identify client needs, while loyalty is maintained through targeted, personalised communications. *Win-back*: Automated follow-ups address client dissatisfaction and inactive accounts.
Influence of familial characteristics on CRM adoption	• Limited investment capacity drives reliance on low-cost, practical CRM tools. • CRM expertise is limited to family members. • Personal relationships with clients are a cornerstone of the business strategy. "Our focus is on using simple methods to maintain strong relationships with customers, which reflects our family values."	• CRM adoption is guided by budget constraints and scalability. • Family members dominate decision-making, but external support is considered when necessary. • Family values influence a trust-driven CRM approach. "Our strategy reflects the care we put into relationships, which aligns with our family's way of doing business."	• Investments in technology are aligned with maintaining family control. • The inclusion of skilled professionals supports advanced CRM. • Family cohesion ensures a seamless customer experience across generations. "Our CRM strategy integrates both innovation and tradition, ensuring our family legacy aligns with modern client needs."
Future insights	Adopt digital tools to improve data management and customer tracking. "We need modern tools to streamline processes, but our relationships remain our biggest strength."	Enhance data management and CRM efficiency. "Our CRM strategy needs refinement, but our strong relationships with clients give us a solid foundation for growth."	Enhance system integration and expand AI applications. "Our focus is on maintaining loyalty through innovation and continually improving our CRM systems."

5.1   Financial independence and risk aversion

Family SMEs are characterised by financial independence, driven by their desire to maintain control and autonomy (Tesolin and de Bruyn, 2015). This fosters a cautious approach to CRM investments, particularly those requiring significant financial outlays. Company A exemplifies this dynamic by relying on low-cost tools such as Excel and social media. While this conservative strategy limits the adoption of advanced CRM technologies, it encourages resourcefulness by leveraging existing networks for customer acquisition and retention. However, CRM implementation demands more than financial investment – it requires organisational changes, employee training, and technology upgrades (Farhan et al., 2018). For financially constrained businesses like Company A, every CRM strategy undergoes careful evaluation to ensure a positive return on investment. This meticulous approach often prioritises human-centric and intuitive methods over expensive platforms.

In contrast, Company B, though financially cautious, has begun allocating resources to basic CRM software, reflecting a balance between risk aversion and modernisation. Company C, with a stronger financial base, strategically invests in advanced CRM systems, aligning its financial decisions with its long-term vision for growth. This interplay between prudence and CRM adoption underscores the importance of aligning CRM strategies with financial realities while fostering sustainable customer relationships.

5.2   Recruitment challenges and intuition-based decisions

Recruitment practices in family SMEs often prioritise familial involvement, preserving decision-making autonomy but limiting access to external expertise. This limitation is apparent in Company A, where CRM decisions are guided more by intuition and personal relationships than data-driven methodologies. Such reliance on informal methods can hinder scalability and the structured implementation of CRM tools. Despite these challenges, family SMEs capitalise on tacit knowledge and relational strengths to personalise customer interactions and foster loyalty. However, as businesses grow, the lack of external expertise becomes a bottleneck for innovation. Companies B and C address this by gradually integrating external talent to complement familial expertise. Company B has adopted structured CRM practices through professional input, while Company C leverages the younger generation's digital proficiency to implement advanced CRM tools, aligning with Bellaaj's (2014) assertion that skilled human resources are critical for effective CRM adoption.

Balancing intuition with professional expertise is essential for family SMEs. Strategic collaborations, targeted training programs, and the inclusion of external professionals can enhance CRM capabilities without compromising familial identity.

5.3   Familiness: values-driven customer relationships

Familiness – a defining trait of family SMEs – fosters customer relationships built on trust, respect, and loyalty (Martín-Santana et al., 2020). This relational focus differentiates family SMEs by prioritising long-term commitments over transactional gains. Across all three companies, cultivating enduring customer loyalty is a shared priority, underscoring their dedication to mutual trust and satisfaction. This values-based approach fosters a unified organisational culture, where employees are closely aligned

with the family's commitment to customer satisfaction (Arrègle et al., 2004). Company C, for instance, integrates family values into an advanced CRM system, effectively combining tradition with technology to enhance customer interactions. Similarly, Company B exemplifies a collaborative management approach that balances relational strengths with CRM adoption.

Familiness not only enhances customer loyalty but also facilitates smoother transitions to modern CRM tools. By aligning organisational goals with relational values, family SMEs can maintain their competitive advantage while sustaining their unique identity.

5.4 Flexible management style and decision making

The flexible and informal management structures of family SMEs enable quick decision-making and adaptive CRM adoption (De Massis et al., 2016). In Company A, centralised leadership ensures swift responses to customer needs, reducing bureaucratic delays. However, this same centralisation can stifle innovation when decision-making is confined to one leader, limiting input from external experts or younger family members.

Companies B and C demonstrate how intergenerational collaboration overcomes these limitations. Younger family members bring digital expertise and fresh perspectives, driving the integration of AI-enhanced CRM tools and data-driven strategies (König et al., 2013). This collaboration bridges the gap between traditional practices and modern technological solutions.

For example, Company B balances the experience of the older generation with the innovation mindset of younger members, leading to a gradual transformation of CRM practices. Similarly, Company C leverages the younger generation's digital proficiency to enhance operational efficiency and customer engagement. This interplay between flexibility and collaboration underscores the importance of balancing tradition with innovation to sustain growth and customer loyalty.

5.5 Long-term vision and legacy building

Family SMEs prioritise the preservation and growth of their customer base as a transferable asset for future generations (Allouche and Amann, 2002). This long-term perspective influences cautious yet strategic CRM investments. Company C exemplifies this by systematically managing client data through advanced AI-driven CRM systems, ensuring sustainability across generational transitions. Similarly, Company B balances traditional customer relationship strengths with gradual CRM integration, ensuring continuity in its customer base. This commitment to legacy-building motivates family SMEs to adopt tools and strategies that support long-term client retention and engagement. By viewing their customer portfolio as an integral part of their heritage, family SMEs align CRM strategies with their broader goal of sustaining the business for future generations.

5.6 Close customer ties and social capital

Family SMEs thrive on strong interpersonal relationships with clients, leveraging social capital built on trust, familiarity, and mutual respect (Carrigan and Buckley, 2008).

Company A relies heavily on the founder's personal network and informal interactions to attract and retain customers, reflecting its focus on personalised service. However, excessive reliance on personal ties can pose challenges, particularly during generational transitions. If customer relationships are not institutionalised, leadership shifts can risk the loss of key clients. Companies B and C mitigate this risk by implementing CRM systems to systematically capture and organise customer data. This ensures continuity in customer relationships and reduces dependency on individual family members (Martín-Santana et al., 2020).

By combining relational strengths with CRM tools, family SMEs enhance operational efficiency while maintaining their unique focus on customer loyalty. For instance, Company C uses predictive analytics to expand its network while preserving its relational essence. Similarly, Company B employs tailored CRM strategies to ensure strong customer retention and loyalty.

6 Conclusions

This study highlights the intricate relationship between the unique characteristics of family-owned SMEs and their adoption of CRM strategies. By examining three Moroccan family SMEs, the research underscores how family dynamics, financial priorities, and long-term visions shape CRM practices. The findings provide valuable insights into the strategic decision-making processes of family SMEs and their balancing act between tradition and innovation. Indeed, family SMEs demonstrate a cautious but purposeful approach to CRM adoption. Their financial independence fosters prudence in investments, encouraging reliance on low-cost tools. While this limits the use of advanced technologies, it also fosters creativity in leveraging existing networks. Recruitment challenges, characterised by a preference for familial involvement over external expertise, further influence CRM implementation. Companies with younger family members or external talent, however, exhibit a better capacity to integrate structured and technologically advanced CRM solutions. Also, the concept of familiness emerges as a cornerstone, fostering value-driven customer relationships built on trust, respect, and loyalty. This relational strength supports long-term customer engagement but can also hinder scalability when overly dependent on personal ties. Social capital and close customer relationships serve as both a strength and a vulnerability, particularly during generational transitions. Moreover, the informal and flexible management structures of family SMEs enable swift decision-making and adaptive CRM implementation. Yet, this flexibility can also restrict innovation when decision-making is centralised within a single leader. Intergenerational collaboration proves pivotal in overcoming these constraints, blending the traditional values of the older generation with the digital expertise of the younger. Finally, the long-term vision of family SMEs, centred on preserving and expanding their customer base as a legacy asset, motivates strategic CRM investments. This focus aligns CRM strategies with broader objectives of sustaining business continuity across generations.

From a theoretical perspective, this study enriches the understanding of CRM within family SMEs by highlighting the influence of unique familial traits. It bridges a critical research gap in FB studies, emphasising the interplay between relational dynamics and CRM adoption. Practically, the findings provide actionable insights for family SMEs, suggesting pathways to integrate modern CRM tools while preserving their relational

strengths. For policymakers and business consultants, the study underscores the need for tailored support mechanisms to help family SMEs overcome barriers to CRM implementation, such as financial constraints and recruitment challenges.

From a managerial perspective, the findings offer actionable insights for family SMEs:

- Focus on scalable CRM solutions by implementing cost-effective tools that align with the business's growth potential, balancing affordability with technological advantages.

- Harness familiness by leveraging the family's relational strengths to foster trust and loyalty while incorporating technology to enhance scalability and efficiency.

- Actively involve younger generations in CRM decision-making to drive innovation and digital transformation, capitalising on their familiarity with emerging technologies.

- Systematise social capital by formalising and managing relationships through CRM tools, ensuring continuity and stability during generational transitions.

While this study offers significant contributions, it is limited by its focus on a small number of cases in a specific cultural context. Future research could expand the scope to include diverse industries and regions, enabling broader generalisations. Quantitative studies could also complement these findings by analysing the measurable impact of CRM strategies on the performance of family SMEs.

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