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RESHMIDILOVA Svitlana

Khmelnytskyi National University

<https://orcid.org/0000-0003-1540-4019>e-mail: [rlsvetlana@ukr.net](mailto:rlsvetlana@ukr.net)

BONDARENKO Denis

Khmelnytskyi National University

<https://orcid.org/0009-0000-7004-0276>e-mail: [denis7bondarenko@gmail.com](mailto:denis7bondarenko@gmail.com)

## CRM SYSTEMS AS A TOOL FOR EFFECTIVE INTERACTION WITH CONSUMERS IN THE CONDITIONS OF COMPETITIVE CHANGES IN TARGET MARKETS

*The article substantiates the need to use CRM systems as a tool for effective interaction with consumers in the context of competitive changes in target markets. The need to choose a CRM system by domestic companies for effective business development and increasing consumer loyalty is argued. The advantages and disadvantages of implementing CRM systems at enterprises are substantiated. The phasing of using CRM systems at domestic enterprises is proposed. The types of CRM systems that are proposed for implementation at enterprises are characterized. The need to use CRM systems that meet the goals and objectives of enterprise development, use the latest information technologies in order to achieve effective interaction with consumers and take into account competitive changes in target markets is substantiated.*

*Keywords: CRM systems, competitive changes, target markets, consumers, marketing activities.*

РЕШМІДІЛОВА Світлана, БОНДАРЕНКО Денис

Хмельницький національний університет

## CRM-СИСТЕМИ ЯК ІНСТРУМЕНТ ЕФЕКТИВНОЇ ВЗАЄМОДІЇ ЗІ СПОЖИВАЧАМИ В УМОВАХ КОНКУРЕНТНИХ ЗМІН ЦІЛЮВИХ РИНКІВ

*У статті обґрунтовано необхідність використання CRM-систем як важливого інструменту забезпечення ефективної взаємодії зі споживачами в умовах зростаючої конкуренції та динамічних змін цільових ринків. Підкреслено, що для сучасних вітчизняних підприємств впровадження CRM-систем є не просто актуальним, а стратегічно важливим кроком для забезпечення стабільного розвитку, адаптації до ринкових викликів та підвищення рівня клієнтської лояльності. У процесі дослідження було аргументовано доцільність вибору CRM-рішень з урахуванням специфіки діяльності українських компаній, їхніх цілей, розміру, технологічного рівня та ресурсного забезпечення. Розглянуто як позитивні аспекти впровадження CRM-систем — зокрема автоматизацію процесів продажу, покращення аналітики клієнтських даних, оптимізацію комунікацій — так і можливі ризики та обмеження, що можуть виникати в процесі впровадження, такі як високі витрати, складність адаптації персоналу, потреба в технічній підтримці. Запропоновано поетапну модель впровадження CRM-систем на підприємствах України, яка включає підготовчий етап, вибір платформи, налаштування, навчання персоналу, моніторинг ефективності та постійне вдосконалення. Надано характеристику основних видів CRM-систем — операційних, аналітичних та колаборативних, — та визначено рекомендації щодо вибору найоптимальнішої моделі для конкретного підприємства. Зроблено висновок, що впровадження CRM-систем, орієнтованих на новітні інформаційні технології, є ключовим чинником досягнення стійкої конкурентної переваги та ефективної взаємодії зі споживачами.*

*Ключові слова: CRM-системи, конкурентні зміни, цільові ринки, споживачі, маркетингова діяльність.*

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### INTRODUCTION

In the conditions of growing competition and changes in target markets, a significant supply of goods on the market, increased consumer requirements for product quality and service, the struggle for customers is intensifying. In such conditions, consumers value personalized offers and attentive attitude to them. To increase customer loyalty, it is necessary to use systems for processing large amounts of information about consumers of individual target markets. The informatization of society requires the use of modern information technologies, in particular customer relationship automation systems – CRM.

Such trends indicate the need to develop consumer-oriented marketing strategies that take into account competitive changes in target markets and the characteristics of the target audience in them. Studies show that the use of CRM system tools will increase the efficiency of interaction with consumers, improve marketing activities and increase the profitability of the company.

### ANALYSIS OF THE LATEST RESEARCH AND PUBLICATIONS

Many scientific works of domestic scientists are devoted to the study of customer relationship management and automation of work with them using CRM systems.

The relevance of implementing CRM systems at enterprises is stated in the work [1]. I. I. Polishchuk considers the CRM system as the basis for the formation of consumer loyalty [2]. In articles [3; 4], the authors emphasize the importance of CRM systems for increasing the effectiveness of the enterprise's marketing activities.

A separate area of research is the determination of the role of CRM systems in the formation of relationship marketing strategies [5]; the study of CRM and CDP as tools for the formation of effective strategies for interaction with customers [6]; consideration of CRM as a source of information for the development of marketing projects and strategic management of the enterprise's competitiveness [7].

A. K. Proshchenko analyzes and investigates the criteria for choosing a CRM system for enterprises [8]. I. V. Nikolayenko, N. A. Navrotsky consider the possibility of using CRM systems as a component of an enterprise's Internet marketing [9]. The work of L. P. Oksamytna and R. I. Pryakha presents approaches to assessing the effectiveness of CRM systems [10]. N. P. Yurchuk studies the essence, principles and features of the functioning of CRM systems on the Ukrainian market [11].

Despite significant achievements in the field of development and implementation of CRM systems for, the issues of choosing a CRM system by domestic companies for their effective development and improvement of interaction with consumers remain relevant. This necessitates the need for further scientific research in this area.

### FORMULATION OF THE ARTICLE'S GOALS

The purpose of the article is to justify the use of CRM systems as a tool for effective interaction with consumers in the context of competitive changes in target markets, determine the stages of their implementation at enterprises, select appropriate types, and justify their use.

### PRESENTATION OF THE MAIN MATERIAL

The concept of CRM is not new, enterprises have used it in their business, independently building close relationships with customers in order to increase their loyalty. CRM includes not only information systems that contain customer relationship management functions, but also the customer orientation strategy itself. The essence of this strategy is to combine various sources of information about customers, sales, feedback on marketing activities, market trends [11].

CRM helps automate the process of collecting information about the customer for further analysis based on the results of marketing campaigns, sales for each customer, service operations, etc. The information obtained about customer relationships is used in various divisions of the company.

So, the CRM system is designed to streamline and optimize processes related to customer service. It is the main analytics and management tool for the head of the sales department in interaction with the company's client. With the help of CRM, you can track sales conversion, statistics for each manager, as well as analyze the sale of goods or services.

The basis of any CRM is the construction of a sales funnel, which will be individually selected for certain business processes. The sales funnel in the CRM system is a visual model that shows the customer's path from the first contact to making a purchase or concluding a deal. It helps to control and manage the stages of sales, track the stage at which each client is, and identify "bottlenecks" in this process.

The function of the sales funnel is that after each stage, more and more potential customers who are not interested in your products or services or do not have the budget for your offers disappear. At the same time, the percentage of motivated customers who have every chance of closing a deal increases. A sales funnel assessment is conducted to maximize the use of resources and structure existing marketing and sales processes. Marketing managers can use a funnel tailored to their business and sales processes to measure the success of their efforts. This allows them to pinpoint where potential conversions are being lost in the sales chain and how the underlying sales model can be optimized. Depending on the structure of the task and the number of stages, all relevant processes can be displayed in the form of a sales sequence graph. Thus, the sales funnel allows you to create a group of mathematically precise tools for assessing and presenting differentiated costs and efforts for attracting customers and options for increasing their loyalty when planning sales.

Depending on the type of company's activity, you can define from 5 to 20 separate steps in the sales funnel. Figure 1 shows an example of a five-level sales funnel.

The five-level funnel includes the following steps.

1. Defining the target group and marketing activities. At the beginning of the process, it is necessary to attract attention to the product or service by, for example, conducting presentations, online campaigns or print advertising. At this stage of the sales funnel, a large number of potential customers who have attracted their attention are in it.

2. Obtaining leads by phone, mail, by making an appointment or by targeted activity on the Internet. At this stage, it is necessary to gain the interest of potential customers. You need to find out who is really interested in the offers. For example, you can send a letter by e-mail.

3. First visit or call, analysis of client needs, assessment of client capabilities, presentation of the product or service. After selecting the general group of potential clients, specific leads are contacted. Initial calls, correspondence or visits and analysis of their needs lead to closer contact. This step allows you to weed out those clients who are not interested in the offers.

4. Specific offer, negotiations and handling objections. This stage of the sales funnel is dedicated to real offers made to attracted clients. Depending on the industry, different sales strategies should be used. At this stage, clients who are not interested in the offers also drop out.

5. Establishing the procedure for cooperation with the client and concluding a contract or a regular sale. At the last stage, products or services are sold. After 5 steps of the sales funnel, the right clients are selected and benefitted from this. Further cooperation with them or subsequent orders are possible [12].

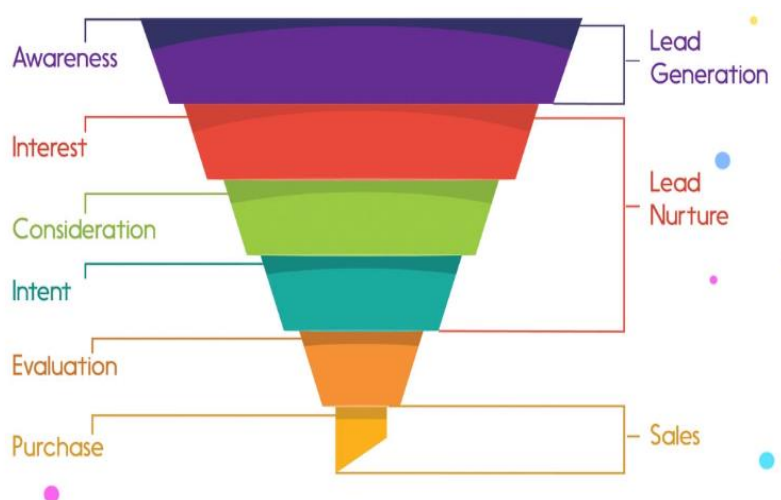


Fig. 1. Sales funnel

Source: based on [12]

Modern sellers use an auto-funnel as an independent automated path for customers on the Internet – from getting to know the business to making a purchase or ordering a service. Its main difference from the usual one is the absence of a salesperson, whose role is played by a text, graphic or audio message on web pages or mailings.

An automated sales funnel is a powerful tool for attracting potential customers to a business and turning them into regular customers. A properly configured automated funnel can increase conversion by ten times. It has a certain structure, some elements of which include not only the creation and placement of content, but also retargeting and carefully thought-out email marketing.

The basic setup of an automated funnel is performed only once, but it can be adjusted depending on the results.

Thus, with the help of a sales funnel, you can increase the capture of new parts of the old target audience of a certain target market or even a completely new one. The more potential customers turn into real buyers, the higher the profitability of the measures taken – and, accordingly, vice versa.

The sales funnel in CRM visualizes the process of working with a client, allows you to quickly determine the stage of interaction with the client, allows the manager to analyze the effectiveness of managers, helps to forecast profits (based on the number of transactions at each stage).

Today, the problem of choosing a CRM system by domestic enterprises remains.

The implementation of CRM systems allows you to obtain the following benefits:

- centralization of customer data, i.e. storing information about customers (communication history, purchases, requests and feedback) in a single database, which ensures personalization of service;
- automation of processes (from automatically sending letters to creating tasks for managers, systematization of work, reduction of human labor and time loss;
- improvement of analytics and forecasting (CRM reports help track the efficiency of the sales department, identify weaknesses and forecast future profits;
- increased productivity due to time savings, a clear action plan and access to complete information.

Advantages and disadvantages of using CRM systems are presented in Table 1.

CRM system implementation is not a simple software installation, it is a change in business processes. In order for this process to be effective, it is necessary to clearly determine which processes in the company need to be improved: sales, marketing, customer support or all together. The implementation will be successful only when all participants – from management to managers – are involved in the process and understand its benefits. It is important to choose the right type of CRM system so that the functionality corresponds to the business processes and campaign objectives. An important aspect is staff training, because even the best system will not produce results if the team does not know how to work with it. After launching CRM systems, it is necessary to constantly analyze the system's operation and improve processes based on it.

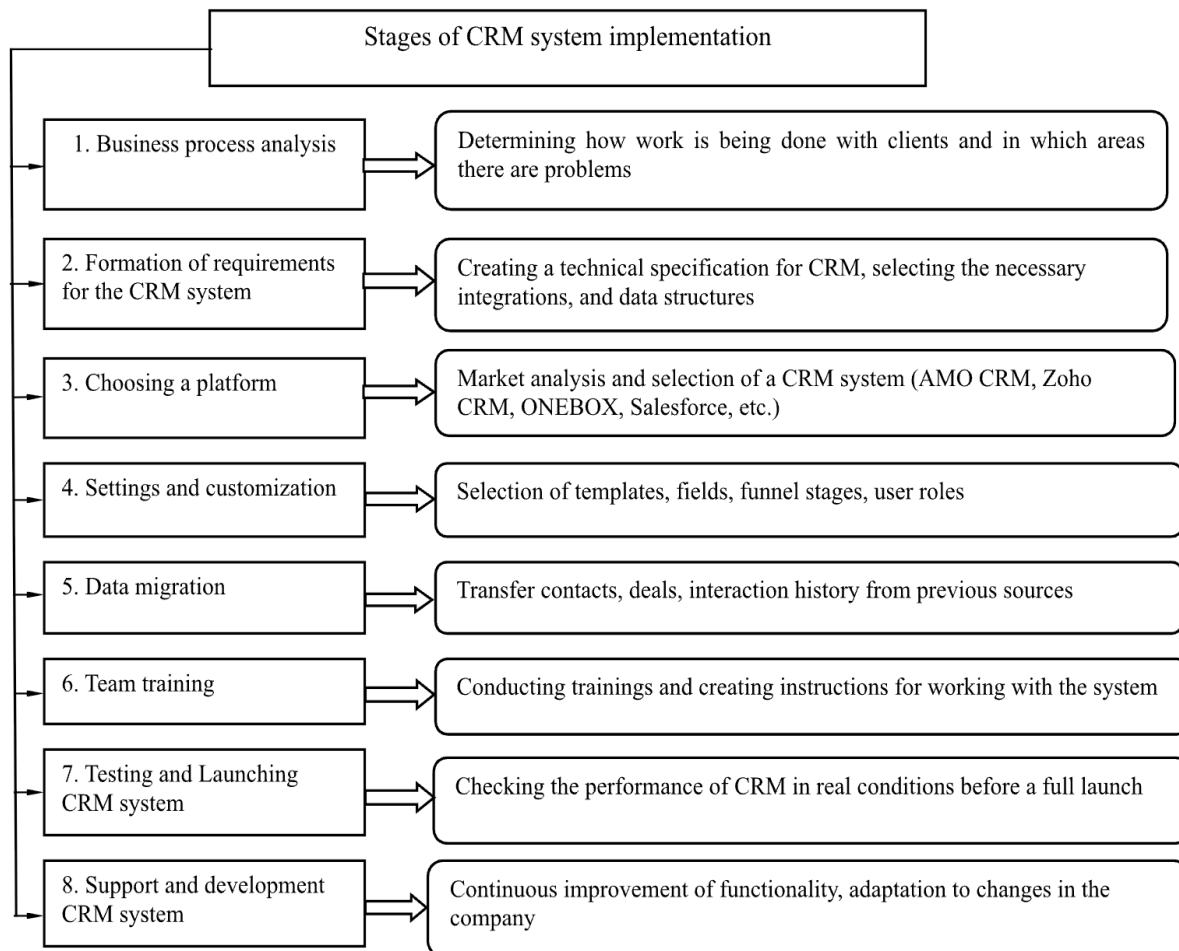
Table 1

**Advantages and disadvantages of using CRM systems**

Advantages	Disadvantages
Focus on sales management and customer engagement support	High cost of implementation and maintenance
Ability to store communication history and track sales opportunities	Dependence on modern technologies and regular system updates
Increasing customer loyalty through personalized service	Risk of compromising confidential customer data
Increasing data accuracy and reducing the risk of errors	The need for staff training for effective use
Ability to analyze data to create effective marketing strategies	A long process of setup and adaptation
Process automation, reducing employee time	Possible limitations in integration with a large number of data sources
Supporting business scalability through integration with other systems	Limited functionality for conducting in-depth analytics

Source: compiled by the authors

The stages of CRM system implementation are presented in Figure 2.

**Fig. 2. Stages of CRM system implementation**

Source: compiled by the authors

For example, a company selling decorative lighting products uses its sales funnel on Instagram. Today, it actively uses pivot tables to record payments, order statuses, and store customer information. This allows you to maintain a basic level of control, in particular, to form the current situation regarding active and completed transactions.

Online sales are conducted mainly by using the standard Instagram functionality to track messages and interactions with customers. This makes it possible to partially control the change in statuses in the sales funnel and the efficiency of managers. The sales funnel is a motivating tool for attracting consumers, which allows you to identify the reasons why consumers refuse to purchase a product at a certain stage. Online sales of goods are carried out mainly via Instagram, products have begun to be advertised via TikTok.

It is possible to integrate various social networks into the CRM system - with IP telephony services; Marketplaces (outlet, prom); Website; landing; Messengers (Viber, Telegram) Instagram, Facebook; SMS mailing. Marketing platforms, in turn, provide automation of marketing processes, including email, social networks, content

marketing and other communication channels and allow you to conduct large-scale marketing campaigns with minimal time and resource expenditure. This significantly reduces the burden on staff and allows you to focus on strategic aspects of the business. In addition, such platforms provide detailed analytics and reporting, which allows you to assess the effectiveness of marketing activities.

A decorative lighting sales company uses Google Sheets to display customer data, transaction stages, payments, and other information. Google Sheets records customers who have already placed orders, as well as those who are in the sales funnel stages and are tracked by assigning statuses when communicating on Instagram.

Despite some flexibility and familiarity with spreadsheets, there are several significant drawbacks:

- parallel work with several spreadsheets (for final reporting, data from different sources must be collected);
- manual updating of order statuses (managers spend a lot of time making changes manually);
- difficulties with automation (it is impossible to create reminders, response templates, or lead processing without third-party tools).

Despite the difficulties, working with tables allowed:

- to determine the structure of the sales funnel;
- to establish which stages of the business process require control;
- to formulate requirements for the CRM system that is needed for the business.

This experience made it possible to understand how to effectively adapt business processes in the CRM environment to automate repetitive actions, reduce the impact of the human factor, and make analytics transparent. To optimize customer interactions, the company was faced with the task of choosing CRM systems for interacting with existing and potential customers. Among the CRM systems common on the Ukrainian market, it is worth noting:

- Microsoft Dynamics CRM (USA);
- Oracle Siebel CRM (USA);
- PERFECTUM CRM (Ukraine);
- SAP (Germany);
- ONEBOX CRM (Ukraine);
- TEAMWOX (Great Britain);
- BLOKNOTAPP (Ukraine);
- APPTIVO CRM SYSTEM (USA);
- CRM EDUCATION (Ukraine) [11].

The cost of paid CRM systems for marketing depends on the selected tariff and the number of users. Among the paid CRM systems, the following should be distinguished: SalesDrive, Zoho CRM, Planfix, LP-CRM. Some CRMs offer boxed solutions with a one-time payment.

A decorative lighting sales company sees the transition to the Ukrainian version of the Sales Drive CRM system not as an expense, but as an investment in business efficiency. Streamlined processes, automatic status updates, recording of all communication with the client, one-click analytics – all this will allow scaling without chaos in the tables.

According to the SaaS (software as a service) model, that is, through cloud platforms, and only some are offered as a standalone solution. The main advantage of the SaaS model for the consumer is the absence of costs associated with installing, updating and maintaining the operability of equipment and deployed software. For most CRM systems available on the domestic market, a monthly cloud rental fee is provided, which ranges from 8–10 USD to 400–500 USD and averages about 15–20 USD [11].

One of the directions of development of CRM systems with a personalized approach to consumers is their integration with social networks, that is, through SCRM. Social CRM is a tool that promotes more effective interaction with the client and uses the collective intelligence of a wider client community to improve contact between the organization and its potential and actual customers. The goal of Social CRM is to build closer relationships with consumers and tie them to the enterprise by better understanding what they want and how they interact with different areas of the enterprise's activity, for example, sales, customer service.

Special software allows you to automate the relevant business processes in marketing activities, sales and service. From the point of view of business management of the enterprise, CRM organizes the work of the front-office (units that directly interact with consumers). ERP systems are aimed at optimizing the work of the back office (internal units that do not directly interact with customers). Combining CRM and ERP systems allows businesses to provide an integrated management system, covering both front-office and back-office processes. This allows companies to improve the efficiency of customer interactions and internal operations, leading to increased customer satisfaction.

## **CONCLUSIONS FROM THIS RESEARCH AND PROSPECTS FOR FURTHER RESEARCH IN THIS DIRECTION**

In modern business, effective communication with customers allows you to achieve growth and long-term success. That is why CRM systems have become an integral part of the digital infrastructure of many enterprises. CRM systems allow you to analyze customer data, automate sales processes and create personalized communications. The use of these tools helps increase customer loyalty, optimize marketing costs and long-term business growth, and also allows enterprises to remain competitive in changing competitive conditions and changes in target markets.

So, today there are many types of CRM, they can differ in their functionality and the ability to integrate with other services, ease of use and complexity of implementation. The choice of a specific CRM system depends on the needs, budget and characteristics of the enterprise. When considering different options, enterprises take into account the functionality, scalability, ease of use and support of the system, compliance with business requirements.

A CRM system is a tool that can significantly improve customer service, automate routine processes, and increase business profitability. However, its effectiveness depends on the right approach to implementation: from needs analysis to staff training. CRM is considered a strategic direction in building a sustainable business concept, based on an approach aimed at meeting consumer needs and increasing their loyalty. In the technological dimension, CRM is a set of applications that work on the basis of a single business logic and are integrated into the company's corporate information environment (often acting as an additional ERP module) using a common database. This approach makes it possible to form a high-quality sales funnel and find weaknesses in the process of working with customers.

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