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THE USE OF CRM IN B2B MARKETING: PRACTICAL GUIDELINES FOR COMPANIES IN THE REPUBLIC OF MOLDOVA

UTILIZAREA CRM ÎN MARKETINGUL B2B: REPERE APLICATIVE PENTRU COMPANIILE DIN REPUBLICA MOLDOVA

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Annotation. *This article examines how customer relationship management (CRM) systems can support market research and marketing decisions in business-to-business (B2B) companies in the Republic of Moldova. The study draws on academic literature, official statistics, institutional and legislative sources, and platform documentation. The analysis proposes four levels of CRM use: record keeping, coordination, analysis and decision support. It shows how companies can combine customer, supplier and competitor information to investigate purchasing criteria, interpret sales outcomes and assess commercial opportunities. The article also proposes criteria for selecting a platform and managing commercial information responsibly. The proposed framework can guide company-level assessment. Its effectiveness and applicability to the Moldovan B2B market remain to be tested using primary data.*

Adnotare. *Articolul examinează contribuția sistemelor de management al relațiilor cu clienții (CRM) la cercetarea pieței și la fundamentarea deciziilor de marketing în companiile B2B din Republica Moldova. Cercetarea are caracter documentar și aplicativ. Analiza se bazează pe literatura de specialitate, statisticile oficiale, sursele instituționale și legislative și documentația platformelor. Sunt propuse patru niveluri de utilizare a CRM: evidența, coordonarea, analiza și fundamentarea deciziilor. Articolul arată cum pot fi corelate informațiile despre clienți, furnizori și concurenți pentru a investiga criteriile de cumpărare, a interpreta rezultatele ofertelor și a evalua oportunitățile comerciale. Sunt formulate criterii de alegere a*

platformei și de gestionare responsabilă a informațiilor comerciale. Cadrul propus poate orienta evaluarea la nivelul întreprinderii. Eficacitatea și aplicabilitatea sa pe piața B2B din Republica Moldova rămân de testat cu date primare.

Keywords: *B2B marketing, customer relationship management, market research, Republic of Moldova, sales analytics.*

Cuvinte-cheie: *analiză comercială, cercetare de marketing, managementul relațiilor cu clienții, marketing B2B, Republica Moldova.*

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Introduction

Information about customers, suppliers and competitors can support a company's decisions, but merely accumulating it does not guarantee better knowledge of the market. Market orientation links the generation of market information, its dissemination within the organisation and the response developed on that basis. The value of information therefore depends on its use in business activity, not merely on its availability in a database (Kohli and Jaworski, 1990).

In B2B marketing, this link must be examined at the level of the customer organisation and of the individuals involved in the purchase. Technical requirements, financial conditions and organisational objectives all feed into the same decision-making process (Webster and Wind, 1972). To prepare a relevant offer, a company must relate customer information to the history of interactions and to its own capacity to respond.

CRM systems provide tools for organising information in this way. From a strategic perspective, customer relationship management is linked to the processes through which a company develops and manages these relationships, not merely to the software application used (Payne and Frow, 2005). CRM processes show a moderate positive association with organisational performance, although this relationship does not demonstrate that acquiring the technology automatically produces economic results (Reinartz et al., 2004).

In the Republic of Moldova, the need to integrate information must be analysed in relation to the structure of the business environment. In 2025, small and medium-sized enterprises accounted for 99.7% of reporting enterprises, according to the statistical classification used by the National Bureau of Statistics (2026). These data describe all the enterprises covered by the statistics in question, not B2B companies separately. Technology adoption in Moldovan enterprises must be examined together with staff training and the organisation of processes (OECD, 2023).

The problem cannot be reduced to choosing a platform. It is necessary to establish which information is relevant, to what extent it is used and which decisions can be improved. Company size should be analysed together with the company's processes rather than used as the sole criterion for selecting technology.

The article aims to identify the conditions under which CRM can support the transition from recording commercial information to using it in market research and in grounding marketing decisions, and to formulate practical guidelines for B2B companies in the Republic of Moldova. It examines the management of customer, supplier and competitor information, platform selection and information protection.

Materials and methods of research

The research has a documentary design with an applied purpose. The sources were grouped according to their role in the analysis. The academic literature underpins the interpretation of CRM, organisational buying and research methods. Official statistics and institutional documents describe the context of enterprises in the Republic of Moldova. Legislative acts are used to delineate compliance issues, while vendor documentation describes platform functionalities.

The synthesis covers three dimensions: the use of information in commercial processes, its use in marketing research and the conditions for implementation. Platforms are compared in relation to commercial tasks and integration requirements. The resulting assessment grid is indicative. The research does not include primary data and does not estimate CRM adoption or its effect on the performance of companies in the Republic of Moldova.

Results and considerations

Assessing CRM use requires a distinction between access to the technology and its actual use. Recording contacts and generating reports do not, on their own, show whether the system contributes to commercial decisions. Its importance should be judged by the way information is consulted and used in the company's activities.

CRM use can be assessed at four levels: record keeping, coordination, analysis and decision support. These levels make it possible to distinguish an application used for recording from a system that supports offer preparation and priority setting.

Table 1. Levels for assessing CRM use

Level	Use assessed	Key question
Record keeping	Keeping contacts, requests, offers and outcomes	Is the necessary information complete and up to date?
Coordination	Assigning responsibilities and tracking sales stages	Can the relationship be continued without losing context?
Analysis	Comparing customers, products, offers and outcomes	What differences and problems are identified?
Decision support	Adapting offers, priorities and resources	Which decision was changed on the basis of the analysis?

Source. Authors' own elaboration based on the strategic and process-based approach to CRM (Payne and Frow, 2005; Reinartz et al., 2004).

The quality of use must be examined separately from the complexity of the application. The assessment considers the timeliness of data, the identification of sources and confirmation of information, the consistency of records and authorised access. A completed record is useful for analysis if the necessary information can be retrieved, interpreted and used in the context of the relationship.

Company size can guide the needs analysis but does not by itself explain the level of use. For a micro-enterprise, the priority may be continuity of record keeping. For a company with several teams, coordinating activities and organisation-wide analysis may become important. The choice of functionalities should be related to the specific difficulties encountered.

Developing skills and organisational capacity is important for the adoption of digital tools (OECD, 2023). This reference provides context for the difficulties of digitalisation, not a measure of CRM adoption. Implementation must include clear rules: who records, who verifies, who updates and who uses the information.

CRM is one component of the commercial information system. Records and interaction histories support opportunity tracking and the documentation of offer outcomes (Microsoft, 2025). Purchasing, inventory and accounting can be managed through separate or integrated applications.

In Odoo, contacts and purchases are managed through dedicated applications. During configuration, the company must determine which information in the partner record is needed to prepare offers and to verify supply conditions (Odoo, n.d.-a, n.d.-b).

For customers, information management must go beyond contact details. Relevant elements include requirements, the roles of contact persons, documents sent, offers, objections and outcomes. The organisational buying perspective justifies distinguishing between the individuals involved rather than treating the customer as a single contact (Webster and Wind, 1972).

In a hypothetical example from equipment distribution, the technical manager may request specifications and documentation, while the purchasing representative may negotiate lead times and terms. The system must allow these requirements to be kept within the same opportunity, so that the offer meets both the technical and the commercial requirements.

In relationships with suppliers, the relevant information includes commercial terms, confirmed lead times, documents and collaboration incidents. The link with the customer becomes important when the commitment made in the offer depends on supply, availability or subsequent service work.

Integration does not mean storing all information in a single application. It concerns the ability to link and use information without losing its source or context. For example, the lead time communicated to the customer must be checked against confirmed information on supply and product availability.

Competitor analysis requires a separate organisation of information. Dynamics 365 allows competitor records to be created and associated with products and sales opportunities (Microsoft, 2026). This functionality provides a recording structure, whereas collecting and verifying the information requires defined responsibilities.

A competitor record may include comparable products, target segments, positioning arguments, published terms and situations in which the company's offers competed directly. For each important piece of information, the source, date and degree of confirmation must be retained. A published price, a condition stated in a procurement procedure and an internal assessment must be distinguished so that an assumption is not used as a confirmed fact.

In the Republic of Moldova, MTender provides data on public procurement procedures and contracts (MTender, n.d.). These data can support the examination of participants and outcomes in the public procurement segment. However, they do not describe all of a competitor's sales and do not, on their own, allow its share of the entire B2B market to be determined.

Internal records can complement public sources. Closing opportunities as won or lost makes it possible to retain the outcome and the commercial explanations (Microsoft, 2025). For analysis purposes, the reason entered by the salesperson must be distinguished from the customer's explanation.

If price is mentioned in an opportunity, the analysis can check its importance relative to lead time, warranty, documentation and services. The aim is to understand the conditions of the choice, not to confirm a convenient explanation.

Moving from record keeping to analysis requires formulating commercial questions. The data can be examined to decide which offer is relevant, which relationship needs attention and where further investigation is needed.

A first use is behavioural segmentation. Zoho CRM enables RFM segmentation, based on the recency of the last purchase, purchase frequency and monetary value. Functionalities and calculation methods depend on the edition; the documentation indicates automatic RFM calculation in the Ultimate edition (Zoho, n.d.). In B2B, the interpretation of these dimensions must be adapted to the type of product and the purchasing cycle.

An infrequent purchase may be normal for equipment but may signal a change for regularly purchased consumables. Customers should therefore be compared within relevant groups rather than

applying the same thresholds to all of them. Segmentation can start from needs, behaviour and relationship type and then be adjusted through research.

Relationship value analysis can complement segmentation by estimating customers' future contribution. For software services provided to organisations under the SaaS model, estimation models must take into account differences between customers and the availability of commercial history. Applying them in other sectors requires adaptation to the characteristics of the business and to the data available (Curiskis et al., 2023).

For companies without sufficient data for prediction, the analysis can track revenue, margin and cost to serve, insofar as these can be determined consistently. For example, two relationships with similar sales may require different levels of support and negotiation effort. This difference should be examined before commercial priorities are set.

Another use is identifying changes. A company can compare, over time, groups of customers defined by a common characteristic, such as the period of their first purchase. The comparison can reveal changes in order frequency or in the structure of purchases.

A deviation from past purchasing history should be treated as a signal for verification, not as evidence that the customer has been lost. A decline in orders can be investigated through a discussion that clarifies the customer's needs, budget or changes in its activity. Analysis identifies the situation, while research helps to explain it.

Information can also support the development of complementary offers. The co-occurrence of certain products in order histories can generate a hypothesis, which must be tested against the customer's needs. What matters is formulating a relevant proposal, not automatically sending additional offers.

For competitors, internal and external data can be combined in the analysis of won and lost offers, known as win–loss analysis. Comparing opportunities by product, segment and terms can direct the investigation towards more precise explanations. Associating competitors with opportunities and recording the outcome are functionalities available in Dynamics 365 (Microsoft, 2025, 2026).

Analytical use must distinguish between description and explanation. A report may show that certain offers were lost, but it does not by itself establish the cause. Comparisons, verification of the context and, where appropriate, discussions with those involved in the purchase are required.

B2B marketing research and application tools

In market research, CRM can help to identify cases and reconstruct their history, but its database should not automatically be treated as a representative sample. It reflects the relationships and interactions recorded by the company. Depending on the objective, the analysis must be supplemented with former customers, prospective customers and external sources.

Table 2. Use of CRM information in marketing research

Commercial question	Method	Role of CRM information	Tool
Why is the offer accepted or rejected?	Win–loss analysis of offers; interviews	Selecting cases and reconstructing interactions	Comparison sheet and commercial records
Which criteria matter to the buyer?	Interviews with participants in the decision	Identifying roles and requirements	Process map and coding frame
Which combination of terms is preferred?	Survey or conjoint analysis	Defining segments	Qualtrics
Which relationships need attention?	Behavioural analysis and qualitative research	Identifying changes	Reports and interviews

Commercial question	Method	Role of CRM information	Tool
Which offer is worth developing?	Analysis of requests and comparative test	Identifying requirements and tracking the response	Request matrix and testing protocol
How are the alternatives positioned?	Desk research and comparative analysis (benchmarking)	Linking competitors to opportunities	Comparison matrix and MTender

Source: Compiled by the authors

B2B interviews must reflect the participation of several individuals in the purchase. The commercial perspective can be compared with the technical or the purchasing perspective, in line with the organisational buying model (Webster and Wind, 1972). In this way, differences between the participants' criteria and the information they need can be identified.

Thematic analysis makes it possible to organise responses into well-supported themes (Braun and Clarke, 2006). The interview guide can ask for examples of supplier selection, comparison of offers and the information that changed the decision.

To study preferences, Qualtrics presents conjoint analysis as a method for investigating preferences in pricing studies (Qualtrics, 2021). Conjoint analysis examines preferences for combinations of attributes such as price, lead time, warranty and services. Its application requires attributes that are relevant to the offer and respondents who actually take part in the decisions.

A comparative test of offers must be designed separately from the simple tracking of responses. The variants, the eligible groups and the outcome measured must be defined before the test is run. Observed differences are interpreted within the limits of the design, without being automatically generalised to the whole market.

A company can start with the analysis of won and lost offers, supplemented by discussions with customers and verification of competitor information. More complex methods can be introduced after assessing data quality and the resources available.

Platform selection and scale of investment

Recommending a platform should start from the dominant process, the need for integration and the capacity to use the system. The number of employees is relevant but not sufficient: a small company may have complex processes, while a larger enterprise may use a relatively standardised sales workflow.

Table 3. Platforms to be assessed according to commercial needs

Situation	Platform	Functional rationale	Verification required
B2B services linking lead generation, sales and support	HubSpot	Marketing, sales and service tools built around the CRM (HubSpot, n.d.)	Features included, cost of scaling up and conditions for data use
Teams focused on negotiations and offer tracking	Pipedrive	Pipeline stages and analysis of opportunity duration, conversion and value (Pipedrive, n.d.)	Integrations and add-on modules
Companies focused on segmentation and sales analytics	Zoho CRM; Zoho Analytics, where applicable	RFM segmentation (Zoho, n.d.)	Edition, calculation methods, data quality and the features of each application
Activities dependent on purchasing and inventory	Odoo	Contact records and purchase management	Workflow configuration and adaptation to local requirements

Situation	Platform	Functional rationale	Verification required
		through dedicated applications (Odoo, n.d.-a, n.d.-b)	
Configurable processes and structured analysis of opportunities and competitors	Dynamics 365 Sales	Management of relationships, opportunities and competitors (Microsoft, 2025, 2026)	Licensing, integration and administration

Source: compiled by the authors

The recommendations are conditional and do not constitute a ranking. The existence of a feature does not prove that it is included in every plan or that it will be used effectively. In Moldova, verification should cover existing applications, data export, integration, implementation support and the conditions for information protection.

The choice can be tested through the company's own scenarios: recording a request, preparing an offer, consulting the history and handing the relationship over to another colleague. A demonstration along this path makes it possible to examine the fit with the process, not merely the availability of a feature.

The scale of investment should be related to use. The total cost must include licences, configuration, migration, integration, training and administration. These values must be estimated for each company and for the specific plan. A low subscription fee does not automatically mean a lower total cost.

Implementation can begin with a clearly defined process. For a micro-enterprise, the priority may be continuity of record keeping; for a medium-sized enterprise, coordination of activities across teams; for a large company, common data management rules and organisation-wide analysis. These guidelines must be checked against actual needs rather than applied as universal rules.

Staff skills are important for the use of digital tools in Moldova (OECD, 2023). Training should be linked to tasks: what is recorded, when it is updated and how the output is used.

Evaluation can be carried out at three levels: data quality, use in processes and contribution to results. Offer preparation time, completeness of records and documentation of outcomes can be monitored in a pilot project. Changes in sales and profit require a broader interpretation that takes into account demand, prices and other changes in business activity.

Managing information in CRM requires rules for collection, use, access and retention. This analysis focuses on personal data protection, trade secrets and competitor research.

The processing of data on representatives of customers and partners must be examined in light of Law No. 195/2024 on personal data protection (Parliament of the Republic of Moldova, 2024). A B2B relationship does not preclude the application of personal data rules: the names, contact details and information about the interactions of an identified or identifiable person may constitute such data.

The purpose and legal basis of processing must be established for each specific operation. Data minimisation, accuracy, storage limitation and confidentiality influence the choice of fields and the configuration of access (Parliament of the Republic of Moldova, 2024). Consent is not the only legal basis provided for by law, and the existence of a contract between companies does not automatically justify every use of representatives' data. Obtaining information from public sources does not remove the applicable obligations, including the obligation to inform data subjects under the conditions laid down by law (Parliament of the Republic of Moldova, 2024).

The protection of negotiated terms, commercial databases and other sensitive information must also be considered in light of Law No. 384/2023 on the protection of trade secrets. Qualification as a trade secret requires the cumulative fulfilment of three conditions: secrecy, commercial value deriving from that secrecy and reasonable steps taken to keep the information secret (Parliament of the Republic of Moldova, 2023). Recording information in a CRM system does not automatically

turn it into a trade secret. Access restrictions and usage rules must be aligned with the specific nature of the information.

Competitor research must be conducted in compliance with Competition Law No. 183/2012. Disparagement and the unlawful acquisition, use or disclosure of confidential information and trade secrets may constitute forms of unfair competition (Parliament of the Republic of Moldova, 2012). Competitor tracking functionalities do not authorise collection by any means. Sources and the degree of confirmation must be retained, and unverified assessments must not be presented as facts.

System administration should include role-based access, rules for updating and retention, technical and organisational measures appropriate to the risks, and procedures for handling data subjects' requests. These measures should be aligned with the applicable legislation, without being treated as a checklist that on its own guarantees compliance.

Table 4. Local legislative references and their relevance to CRM use

Legal act	Operation concerned	Aspect to verify
Competition Law No. 183/2012 (Parliament of the Republic of Moldova, 2012)	Researching and communicating about competitors	Origin of information and avoidance of unfair practices
Law No. 384/2023 (Parliament of the Republic of Moldova, 2023)	Protection of commercial information	Qualification criteria and measures to keep information secret
Law No. 195/2024 (Parliament of the Republic of Moldova, 2024)	Processing of personal data	Purpose, legal basis, access, retention and rights

Source: compiled by the authors

The use of data in research should be limited to the information needed. Replacing names with codes does not automatically amount to anonymisation: pseudonymised data can be attributed to a person by means of additional information kept separately (Parliament of the Republic of Moldova, 2024). Published examples and documents should be checked to avoid the unauthorised identification of individuals or the disclosure of commercial terms.

When assessing a platform, a company should determine what information it processes, for what purpose and who has access to it. The interpretation of the legal framework depends on the consolidated version of the acts and on the operation being analysed.

Conclusions

An assessment of CRM should show not only which application a company uses but also what it does with the information it accumulates. Record keeping, coordination, analysis and decision support are distinct dimensions of assessment. Recommendations should address the level and the problem identified.

For B2B companies in the Republic of Moldova, the first step is to clarify which decisions require better information. The choice of technology should follow this analysis, and skills development should accompany implementation, in line with the difficulties identified in the context of digitalisation (OECD, 2023).

CRM can support relationship continuity and opportunity analysis. Integration with purchasing, inventory and accounting can extend the usefulness of information but must be justified by the company's processes. The platforms presented are alternatives to be assessed according to needs, not universally recommended solutions.

Advanced use of the data requires clear commercial questions: which customers have different needs, where changes occur, why offers are lost and which proposals are worth testing. CRM data provide a starting point, which must be supplemented by research and by verifying explanations.

For competitor analysis, it is recommended to retain the source, date and degree of confirmation and to link information to specific opportunities. Documenting an alternative should not be confused with demonstrating the cause of an outcome, and public procurement data should not be generalised to the entire market.

Information protection must be built in, from defining purposes and fields to access and retention. Personal data, trade secrets and the rules on competitor research require separate treatment. The B2B context does not remove obligations towards individuals, and using an application does not demonstrate compliance (Parliament of the Republic of Moldova, 2012, 2023, 2024).

The article's contribution lies in linking four levels of CRM use with questions that companies can test in their commercial activity. A further stage could validate the assessment grid through case studies of B2B companies in the Republic of Moldova and by comparing usage indicators before and after implementation.

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