

Flexibility in IT Project Management: A Case Study of CRM Implementation

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Abstract

Aim: This article aims to elucidate the significance of flexibility in IT project management. The article emphasises the necessity for adaptation to evolving market conditions, encompassing legal developments, technological innovations and intensifying competition.

Methodology: The article employs a case study methodology which allows for a comprehensive examination of intricate processes within their intrinsic context. An analysis of the literature on the subject was also conducted.

Results: Implementing a customer relationship management (CRM) system exemplifies the application of the SCRUM methodology, which facilitates flexibility, enabling more expedient responses to changes while maintaining budgetary constraints and project deadlines and ultimately achieving customer satisfaction.

Implications and recommendations: Implementing the SCRUM methodology in the context of IT project management facilitates flexibility and adaptation to evolving market demands, thereby contributing to the success of projects.

Originality/value: The article underscores the significance of identifying an optimal project management methodology in light of the necessity for flexibility. It illustrates the pragmatic application of the SCRUM methodology in implementing a customer relationship management (CRM) system.

Keywords: Agile project management, CRM implementation, IT flexibility, project adaptability

1. Introduction

In a rapidly evolving business environment, agility in project management emerges as a pivotal concern. A literature review suggests that the capacity to adapt to shifting circumstances and evolving stakeholder expectations is a crucial determinant of project success (Grześ-Bukłaho, 2022; Jędralska & Czech, 2011). Nowadays, an increasing number of companies and organisations are facing the challenge of facing dynamic change and changing demands of their customers. This is particularly evident in globalisation and process complexity, where organisations that demonstrate agility in responding to change gain a competitive edge (Pukas, 2019; Wilsz, 2016). IT projects are vital to modern organisations, facilitating growth and adapting to the rapid changes that characterise the contemporary business environment. In an era of dynamic technological development and thus increasing competition, the flexibility of IT projects is crucial for companies to respond to new market requirements and meet customer needs. A flexible approach to project management allows for ongoing adaptation to changes, thereby enhancing the efficiency of companies in developing new solutions. With a flexible approach, it is possible to maintain control over predetermined budgets and schedules while ensuring the ongoing quality of projects.

The article analyses the relevance of flexibility in project management methods and its impact on the efficiency of project implementation. It is based on a synthesis of existing research findings. This article aims to demonstrate the significance of flexibility in IT project management. This article focuses on the significance of a particular project management methodology in this field. It employs the case study method, which enables the comprehensive examination of intricate processes within their intrinsic contexts. This approach facilitated an understanding of the distinctive features of the company's CRM system, considering the challenges associated with its development and implementation and its adaptability. Through this analysis, insights were gained regarding the efficacy of the selected project management methodology.

The article is structured as follows. Initially, the issue of flexibility in project management is presented, and the main features of an IT project are outlined. Additionally, references are made to project management methodologies. Subsequently, the essence of CRM systems is elucidated. Finally, a case study of a CRM implementation is presented. The conclusion offers a summary of the research primary conclusions and an analysis of the research processes.

2. The Significance of Flexibility in the Context of IT Project Management

In project management, flexibility denotes the capacity to modify activities in light of changing circumstances and requirements. In the present era of rapid business change, the capacity to respond expediently and effectively to emerging challenges is paramount. Grześ-Bukłaho (2022) underscores the pivotal role of flexibility as a core attribute of contemporary organisations, particularly evident in the context of IT projects which are inherently characterised by a volatile and often unstable environment. During the implementation phase, new technologies may emerge, necessitating adaptations or complete changes to the existing solution. In the context of rapid change, it is crucial to innovate and effectively manage security risks, including threats such as hacking attacks. Flexibility in project management enables efficient adjustments to the schedule and resources in response to evolving business requirements. A significant element is the capacity to respond expeditiously to circumstances that require project alterations, frequently entailing budget and schedule adjustments. Contemporary project managers must adopt a proactive stance, initiating discourse with the team to collectively identify the most optimal solutions. As Cobb (2012) observes, a project manager's capacity for flexibility is a key determinant of their ability to make prompt and effective decisions, which is crucial in enhancing team effectiveness. Openness to change and the capacity to adapt actions in response to evolving circumstances are fundamental tenets of effective project management. The subsequent sections of this article will examine the characteristics of IT projects and management practices that facilitate flexibility in project delivery.

2.1. IT Project Management Methodologies: Agile and Waterfall

The Project Management Institute (2024) defines a project as a temporary endeavour to realise unique services, products or outcomes. An IT project is defined as a project to create an information system. An information system is a collection of interrelated elements, including hardware, software, human resources, organisational elements and information. The function of an information system is to process data using computer technology. IT systems are most often associated with systems that support the operation of businesses. However, the concept of an IT system is broader, encompassing software and Internet use.

Information technology (IT) systems are often regarded as instruments that facilitate business operations. However, the notion of an IT system is considerably broader, encompassing software, technology infrastructure, and web-based resources, which collectively constitute a comprehensive information ecosystem (Philips, 2010). It is important to acknowledge the significant contribution of these systems in facilitating the integration of business processes and enabling the effective management of data and communication within organisations.

In the context of comprehensive digitalisation, IT projects are vital for automating processes in companies and public institutions. An IT project focuses on developing an IT system which includes software, hardware, human resources, and organisational elements that process data through computer technology (Philips, 2010, p. 18). These projects can range from implementing new software and hardware to launching complex IT infrastructure initiatives (Pietras & Szmít, 2003, p. 58). For instance, software projects like order management systems enhance operational efficiency by allowing for product management within e-commerce platforms. Similarly, customer relationship management (CRM) systems optimize customer interactions, improving service and business efficiency. These projects are typically defined by clear objectives, timelines, budgets, and resources, with flexibility in project management becoming crucial as project scopes often evolve due to shifting requirements (Philips, 2010). Overall, the complexity of IT projects involves distinct stages, each requiring specific responsibilities, which may need adaptation based on the project's demands. Figure 1 provides a comprehensive overview of the typical phases involved in IT project implementation.

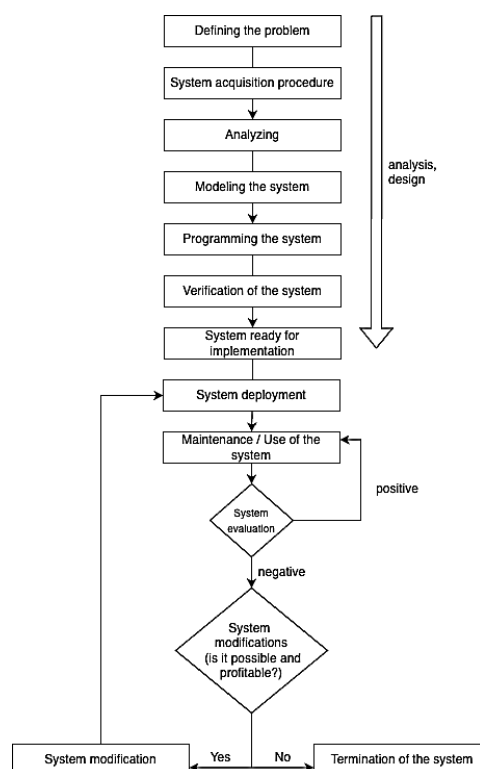


Fig. 1. Stages in the development of traditional IT projects

Source: own elaboration based on (J. Pondel, M. Pondel, 2011, p. 179).

In IT projects, two prevalent management methodologies are the Waterfall and Agile approaches. The Waterfall approach follows a linear structure, while Agile is characterized by continuous, iterative development and testing. Agile divides projects into discrete phases called ‘sprints,’ lasting from one week to one month, during which specific tasks are completed. This methodology allows for ongoing client involvement and feedback, enabling changes at any stage. A defining feature of Agile, especially SCRUM, is the emphasis on continuous customer participation, adhering to the ‘check and adapt’ principle (Schwaber & Sutherland, 2016).

The cascading methodology, or the linear-sequential model, is called the Waterfall methodology. The methodology is based on a linear approach to software development, necessitating that the team can only progress to the subsequent phase of work if the preceding stages have been completed. In contrast to the Agile methodology, this approach entails the implementation of a pre-defined, inflexible work schedule. Consequently, once the tasks in the schedule have been completed, it becomes challenging to alter previous phases. Additionally, all requirements are defined at the project’s outset and seldom modified throughout its duration. A comparative analysis of these two methodologies is illustrated in Table 1.

Table 1. A comparative analysis of the Agile and Waterfall methodologies

	Agile	Waterfall
Structure	Iterative, flexible	Sequential, linear
Project changes	Easy to implement	Difficult to implement
Cooperation with the client	Close and regular communication	Limited, particularly at the outset and conclusion of the process
Delivery	Gradual, after each iteration	At the end of the project
Documentation	Minimal	Comprehensive
Planning	Dynamic and subject to ongoing adjustment	Static, defined at the beginning
Suitable projects	Dynamic, changing requirements	Stable, constant requirements

Source: own elaboration based on: (Kaczor, 2016).

The two methodologies differ considerably. In project work, one may encounter disparate approaches to project management. The selection of methodology is contingent upon a multitude of factors, encompassing the attributes of the project, the client’s expectations, and the resources available to the team. However, the question arises which methodology is more conducive to achieving project flexibility.

The choice of project management methodology significantly affects a project’s flexibility. Agile methodologies, characterized by openness and adaptability, allow project teams to adjust continuously to changing requirements. For instance, the SCRUM methodology uses an iterative approach with regular check-ins, enhancing the likelihood of success (Schwaber & Sutherland, 2020). In contrast, the Waterfall methodology follows a rigid, linear process that can struggle to adapt to changing client needs (Kerzner, 2017). Research indicates that projects using Agile methodologies are 3.5 times more likely to succeed compared to those using Waterfall, highlighting the importance of flexibility in effective project management (Cobb, 2012). Therefore, businesses in dynamic environments should consider adopting Agile methodologies to respond more effectively to customer needs and market changes.

2.2. Changing and Developing Customer Relationship Management: From the First CRM Systems to Innovative Technological Solutions

In today’s business environment, building positive customer relationships is essential for effective operations. It is important to gather not just basic contact information, but also personalized preferences regarding communication styles and timing. The fields of customer relations, acquisition, and loyalty are extensive. In the 1990s, the U.S. initiated efforts to create systems for managing

customer contacts, leading to the development of customer relationship management (CRM) IT systems, which evolved from sales force automation (SFA) and customer service systems (CSS) (Guerrero, 2024).

Sales Force Automation (SFA) and Customer Service Solutions (CSS) are crucial for managing customer relationships. SFA helps sales teams manage leads and interactions, enhancing sales efficiency (Smith, 2020). CSS improves customer service through ticket management and multi-channel communication (Johnson, 2021). Integrating these systems allows organizations to better meet customer needs, leading to increased satisfaction and loyalty (Davis, 2019).

Gradually, an increasing number of companies began to recognise the advantages of utilising such tools. Over time, numerous organisations invested in developing this type of solution, leading to the emergence of the term 'CRM' (Customer Relationship Management). Initially, these were large, desktop-based systems that have since evolved significantly now can be operated from a mobile phone or tablet.

Customer relationship management (CRM) is a customer-focused business philosophy that should be integrated throughout the organization. In this approach, customers are viewed as valuable assets, with their needs and preferences guiding the organization's strategies. The goal is to move beyond occasional purchases to build long-term, mutually beneficial relationships. While information and communication technology support CRM, implementing a CRM system alone does not mean a full CRM strategy is in place. A primary aim of CRM is to enhance customer satisfaction and loyalty by analysing behaviour and addressing needs (Bartuś, 2007; Dyche, 2002; Tiwana, 2003).

The term CRM is associated in many areas, which translates, among other things, into a multifaceted approach to the issue, which is related to (Peppers & Rogers, 2011; Mazur, 2010; Buchnowska, 2010):

- implementing a customer-focused strategy, processes and organisational culture in the organisation,
- information technology to support the implementation of customer-oriented strategies and processes,
- building relationships with and managing customers to optimise long-term benefits,
- the process of acquiring and utilising broad customer knowledge.

The contemporary CRM system is designed to facilitate the organisation of customer data while simultaneously providing the means to enhance the efficacy of customer engagement by implementing a bespoke strategy tailored to the specific requirements of a given customer. The most popular functions offered by CRM systems are (Synergis CRM, 2024):

- contractor knowledge base,
- managing the sales process,
- coordinating the work of the sales department,
- tool for issuing offers,
- results reporting tool,
- email integration.

The current business landscape focuses on generating leads – individuals who initiate contact with entrepreneurs, often through completing a contact form.

Customer Relationship Management (CRM) software primarily facilitates the sales process and is widely used by both marketing and sales departments. It is one of the fastest-growing software categories, with a market value of USD 41.93 million in 2019 (Oracle, n.d.). This reflects the eagerness of entrepreneurs to adopt CRM solutions to expand their businesses and increase revenue.

Modern CRM systems extend beyond managing customer relationships; they are vital for implementing organizational strategies, helping to set achievable goals, and evaluating the effectiveness of customer

management activities. As Pukas (2019) notes, appropriate CRM objectives enable more effective data analysis, leading to improved marketing and sales strategies, greater customer satisfaction, and enhanced business efficiency.

Viewing CRM implementation as a strategic investment can strengthen customer relations and improve internal processes, thus fostering a competitive advantage. The following section presents an example of CRM implementation in a real estate company.

3. Case Study

This analysis focuses on a company in Poland's property development sector, which has been operating for five years. The company prepares, markets, and sells development investments in northern Polish cities and offers rental services for investment flats. It has two teams: one for sales and another for after-sales and rentals. The company faced organizational challenges in these departments due to a lack of structure and efficient data management tools. To address this, it sought a tailored CRM system to improve internal communication, streamline processes, and enhance customer relationships. The developer approached a Software House for a custom CRM solution. However, during implementation, the Software House's project management methodology was inadequate, failing to adapt to the evolving needs of the client. The analysis will explore the challenges faced, proposed solutions, and potential implications for the company.

3.1. Identified Problems

In the presented case study, issues related to the development company's activity were encountered, and Software House used the chosen methodology for the project. The project was to create a dedicated CRM solution for the development company, with the primary aim of solving its organisational problems. The following list provides a more detailed description of the key issues with a clear impact on the overall success of the project.

- The absence of standardisation in the data entry process for the Excel sheets used was a key issue. The developer's staff utilised the Excel file in their work; however, the absence of organised data entry and the dispersion of different sheets, in conjunction with the delayed completion of entries, resulted in the loss of contact details of potential property buyers, as well as dissatisfied customers with the after-sales service. The data entry process was characterised by a lack of standardisation, with each employee employing their unique method, leading to confusion over the management of the information in the Excel file.
- Communication issues led to the incorrect merging of claims entries with sales contact entries (i.e., potential customers). The allocation of tasks between the sales and after-sales departments lacked logical structure, resulting in frequent informational disarray. Furthermore, the practice of multiple employees working on a single file caused numerous misunderstandings across the organisation, exacerbated by the absence of an integrated tool to support the operations of both departments.
- Inadequate project management methodologies were a recurring issue in the case study involving Software House. The client accepted a work schedule based on the waterfall methodology, and the project team initially defined requirements and schedules accurately. However, as new business needs arose, the developer's sales department proposed additional requirements that differed from the original plan. This constant influx of new tasks expanded the project scope and forced developers to revisit completed work, leading to accusations of inefficiency from the client. In an effort to address the problem, the project team advised the client to adhere to the original schedule. Unfortunately, this strained the relationship, resulting in ongoing delays and client dissatisfaction.

3.2. Proposed Solutions

In order to address the issues delineated in subsection 3.1, the following solutions are proposed to remedy the issues identified in the case study under discussion.

- The implementation of a CRM system in a property development company has enabled the integration of all organisational processes. CRM has facilitated the establishment of a dedicated system that encompasses property sales and rentals. The Software House has provided the developer with the capability to structure sales and after-sales processes. A fundamental element of the organisation's operations is the standardisation of data entry. Utilising specialised forms ensures uniformity in the process for all employees, accelerating the process through automation. The CRM system has been instrumental in enabling employees to execute sales plans and efficiently engage with prospective customers. The CRM system has facilitated the establishment of a unified system for managing sales, claims handling, and rental property management.
- Changing the project management methodology from Waterfall to Agile (SCRUM). Initially, the project was conducted using the conventional Waterfall approach. However, as the project scope evolved and expanded, the Project Manager recommended transitioning to the Agile methodology, specifically SCRUM. Adopting SCRUM enhanced the project's flexibility, leading to a more comprehensive understanding of the client's activities, which was subsequently integrated into the work plans. The team was able to adapt the direction of their work to the client's needs. Implementing a two-week sprint approach enabled the client to verify the completion of tasks, making it easier for the product owner to make changes on the fly without having to modify significant portions of the work already completed. Using SCRUM also improved the contact between the Software House and the client through regular meetings. The client expressed satisfaction with understanding his needs, fulfilling his expectations, the transparency of the work plan, and the perception of the team as a reliable and competent unit.

3.3. The Impact of the Implementation on the Organisation

The development company has seen several positive changes by implementing the solutions described above. First of all:

- improved organisation of the work of the sales and after-sales teams thanks to standardised data entry standards;
- the implementation of CRM has reduced the number of errors in the existing Excel files, and, as a result, customers have perceived a better quality of service from the developer;
- the automation of processes after the implementation of CRM has reduced the amount of work that was previously done manually, which translates into a reduction in labour costs;
- the change in the project management methodology has resulted in better communication with the software house, thanks to which the designed CRM has responded to the organisation's current needs.

The project was completed under the stipulated schedule, and the client was satisfied with the outcome. The case of the development company analysed demonstrates the significance of employing a suitable methodology for effective project management. Implementing the SCRUM methodology proved instrumental in resolving initial communication issues that arose from a change in the scope of work between the project team and the client. Furthermore, it facilitated collaborative planning of future activities and enabled the flexibility that the SCRUM methodology fosters.

4. Conclusions

The flexibility that characterises project management enables an individualised approach to be adopted for each project, with the overarching objective being the creation of a product tailored to the customer's specific requirements. However, external factors often challenge this flexibility, such as increasing globalisation, technological innovations, or new legal regulations, which introduce complexity into organisational activities (Dudycz et al., 2012). Moreover, current companies are keen on growth, which may be limited by the changes introduced. The extant literature highlights the underestimation of project complexity as a primary organisational error, with deleterious consequences for the project's overall implementation (Frączkowski, 2003). The flexibility of project management methodologies allows the developed product to be tailored to users' expectations at each process stage. The absence of rigid plans allows project teams to be more creative, proposing novel solutions and adapting previously created product components to accommodate customer feedback or unforeseen changes, such as a pandemic or war. This results in the creation of innovative products that are repeatedly tested, ensuring the quality of the applications developed. A review of the literature shows that the majority of projects are now being delivered using agile methodologies.

In a dynamic business environment, the ability to adapt project management approaches is paramount, as selecting an appropriate methodology can significantly influence the success of a project. Agile methodologies, such as SCRUM, facilitate rapid adaptation to evolving requirements and priorities, enabling effective management. A recurrent challenge in IT projects is the absence of a well-defined vision from the business side, which often leads to an influx of change requests (Chomiak-Orsa & Kołtonowska, 2016). They emphasise the significance of business leaders articulating a clear product vision, emphasising the fundamental question of what the system should be. The initial stages of a project can be challenging, particularly in determining the functionality of the result. The utilisation of agile methodologies has been identified as beneficial in such instances. Through their iterative approach, these methodologies provide a systematic means of monitoring progress and implementing continuous improvements, thereby increasing the agility of project teams.

The case study confirmed that using the SCRUM methodology leads to a noticeable improvement in communication between the project team and the client. The success of ongoing projects using agile methodologies is contingent on the motivation of team members and their competencies (Mierzwińska, 2013). It can therefore be concluded that the openness of the organisational culture to frequent feedback and joint knowledge sharing is one of the key factors influencing the success of current projects. The regularity of feedback means that project team members are constantly solving problems that arise and are more willing to discuss the solutions used in individual elements of the project, giving the feeling that the whole team is responsible for the project rather than individual units.

Flexibility in project management is an important prerequisite for increasing the chances of successful project completion, which is crucial in an ever-changing business environment. Flexibility allows you to adapt quickly to new events and their challenges. By adopting a flexible approach, one can optimise the whole process, develop better risk management practices and, most importantly, create value tailored to the client's current needs at every project stage.

The research carried out has certain limitations that should be noted. The literature review may not have considered all research findings, especially those related to specific cases of CRM implementation in different sectors. The case study on the transition from Waterfall to SCRUM focused on a specific project in a specific organisation, which may limit the generalisability of the results. In addition, specific factors such as team skills or management support may have influenced the effectiveness of the implementation, making it difficult to generalise the findings to project implementation in other settings.

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Elastyczność w zarządzaniu projektami IT: studium przypadku wdrożenia CRM

Streszczenie

Cel: Artykuł ma na celu ukazanie roli elastyczności w zarządzaniu projektami informatycznymi. Skupia się na potrzebie adaptacji do zmieniających się warunków rynkowych, w tym kwestii prawnych, postępu technologicznego oraz rosnącej konkurencji.

Metodyka: W artykule zastosowano metodę studium przypadku, która pozwala na szczegółowe przedstawienie skomplikowanych procesów w ich naturalnym kontekście. Dokonano także analizy literatury przedmiotu.

Wyniki: Na przykładzie wdrożenia systemu CRM przedstawiono zastosowanie metodyki SCRUM, która wspiera elastyczność, umożliwiając szybszą reakcję na zmiany przy jednoczesnym zachowaniu budżetu i harmonogramu oraz osiągnięciu satysfakcji klienta.

Implikacje i rekomendacje: Zastosowanie metodyki SCRUM w zarządzaniu projektami informatycznymi sprzyja elastyczności i adaptacji do zmieniających się wymagań rynkowych, co przekłada się na sukces projektów.

Oryginalność/wartość: Artykuł podkreśla znaczenie wyboru odpowiedniej metodyki zarządzania projektami w kontekście elastyczności, prezentując praktyczne zastosowanie metodyki SCRUM na przykładzie wdrożenia systemu CRM.

Słowa kluczowe: zarządzanie projektami Agile, wdrożenie CRM, elastyczność w IT, adaptacja projektów
