

Business practice report carried out at Sergeng Ltda.: Strengthening commercial communication and customer loyalty through the implementation of a CRM system

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Dedication

To my family, whose unconditional support has been the foundation of every academic and personal achievement, and to those who, with their trust, made it possible for this double degree experience to become a formative reality and make me the person I am today, to the teachers of the Universidad Santo Tomás and the Audencia Business School, whose academic orientation and intellectual demand forged a globally conscious vision of international business.

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Resumen

Sergeng Ltda., empresa colombiana del sector de servicios de limpieza, vigilancia y mantenimiento, gestionaba sus relaciones comerciales mediante herramientas manuales e independientes, lo que generaba dispersión de la información, tiempos de respuesta lentos y baja trazabilidad en las interacciones con los clientes. Frente a esta situación, se planteó como objetivo la implementación de un sistema de Customer Relationship Management (CRM), específicamente la plataforma Zoho CRM, como herramienta estratégica para sistematizar los procesos comerciales, centralizar la información de los clientes y fortalecer los mecanismos de fidelización de la empresa. La metodología desarrollada comprendió cuatro fases: un diagnóstico inicial de los procesos comerciales existentes mediante entrevistas y observación directa; una evaluación comparativa de las plataformas CRM disponibles; la configuración y personalización del sistema seleccionado; y una implementación piloto con una muestra representativa de la cartera de clientes. Como resultado, los indicadores preliminares del piloto evidenciaron mejoras en el tiempo promedio de respuesta a las consultas de los clientes, en la centralización de la información y en la tasa de adopción de la plataforma por parte del equipo comercial. La experiencia demostró que la incorporación de herramientas digitales en las pymes requiere no solo una implementación técnica adecuada, sino también una gestión del cambio organizacional y capacitación de los usuarios, factores determinantes para garantizar la sostenibilidad del impacto del CRM a largo plazo.

Palabras clave: CRM, Zoho CRM, customer loyalty, service marketing, change management.

Abstract

Sergeng Ltda., a Colombian company in the cleaning, security, and maintenance services sector, managed its business relationships using manual and disparate tools that led to scattered information, slow response times, and poor traceability in customer interactions, therefore, the objective was to implement a Customer Relationship Management (CRM) system, specifically the Zoho CRM platform, as a strategic tool to systematize business processes, centralize customer information, and improve the company's customer loyalty mechanisms, the methodology comprised four phases: an initial assessment of existing business processes through interviews and direct observation, a comparative evaluation of available CRM platforms, the configuration and customization of the selected system, and a pilot implementation with a representative sample of the customer portfolio, as a result, preliminary indicators from the pilot showed a number of improvements in the average response time to customer inquiries, in data centralization, and in the sales team's adoption rate of the platform, experience shows that the adoption of digital tools in SMEs requires both technical implementation and appropriate management of organizational change and user training, aspects that determine the sustainability of the CRM's impact over time.

Keywords: CRM, Zoho CRM, customer loyalty, service marketing, change management.

Content

Introduction.....	12
1. Report on business practice in Sergeng Ltda.....	13
1.1 Context of business practice	13
1.2 Justification.....	13
1.3 Objectives.....	14
1.3.1 General objective	14
1.3.2 Specific objectives	14
2. Company profile	15
2.1 Company name	16
2.2 Corporate purpose of the company	16
2.3 Address, telephone, email and immediate supervisor	16
2.4 Organizational structure.....	17
2.4.1 Company mission.....	18
2.4.2 Company vision	18
2.4.3 Company organizational chart	18
2.5 Economic aspects.....	18
2.5.1 Macroeconomic environment	19
2.5.2 Microeconomic environment	20
2.6 Portfolio of products and/or services of the company	22
2.7 Aspects of the market served by the company.....	22
3. Position and functions performed	23
3.1 Position held.....	23

3.2 Assigned roles	24
3.3 Processes, procedures and tools	25
4. Conceptual and regulatory framework.....	25
4.1 Conceptual framework.....	26
4.2 Regulatory framework	29
5. Contributions.....	30
5.1 Value-added proposition to the company.....	30
5.1.1 Identification of the problematic situation.....	30
5.1.2 Contribution of knowledge to the company.....	31
5.1.3 Impact from results and/or achievements	32
5.2 Company contributions to the training process.....	33
5.3 Improvement plan	34
5.3.1 Sustained CRM adoption by the sales team.....	34
5.3.2 Quality and integrity of customer data.....	36
5.3.3 Advanced Trade Tracking Automation	37
6. Conclusions and recommendations.....	39
References.....	42

List of tables

Table 1. <i>List of assigned roles and weekly hours spent</i>	24
Table 2. <i>Proposed improvement plan</i>	38

List of figures

Figure 1. <i>Sergeng Ltda.'s Business Development Timeline.</i>	15
Figure 2. <i>Organizational structure of the company.</i>	17
Figure 3. <i>PEST analysis of the macroeconomic environment of Sergeng Ltda.</i>	20
Figure 4. <i>Sergeng Ltda.'s microeconomic environment - Analysis of Competitive Forces.</i>	21
Figure 5. <i>Sergeng Ltda.'s competitive positioning matrix.</i>	22
Figure 6. <i>Sergeng CRM Strategy Implementation Roadmap.</i>	33
Figure 7. <i>Gantt chart of the activities carried out during the practice.</i>	39

List of appendices

Appendix A. <i>Interviews for the diagnosis of customer management processes.</i>	44
Appendix B. <i>CRM platform benchmarking matrix.</i>	47
Appendix C. <i>Screenshots of the dashboard set up in Zoho CRM.</i>	48
Appendix D. <i>Summary table of training materials for the sales team that were delivered.</i>	51

Glossary

API (Application Programming Interface): a set of protocols and tools that allow communication between different software systems, facilitating the integration of digital platforms without the need for additional developments.

CRM (Customer Relationship Management): customer relationship management system that centralizes, automates and coordinates an organization's business interactions with its customer base, both current and potential.

Dashboard: visual dashboard that consolidates and presents in real time the most relevant performance indicators of a process or system, facilitating data-based decision-making.

KPI (Key Performance Indicator): a quantifiable indicator of the degree of compliance with a strategic or operational objective within an organization, used to monitor the progress of improvement initiatives.

NPS (Net Promoter Score): a customer loyalty metric that measures the likelihood that customers will recommend a company's products or services, calculated from a scale of 0 to 10.

SaaS (Software as a Service): a software distribution model in the cloud by which applications are accessible over the internet without local installation, under a subscription scheme.

SME: small and medium-sized enterprises, a classification that groups productive units with certain ranges of employees and assets, in accordance with current Colombian legislation.

Zoho CRM: Customer relationship management platform developed by Zoho Corporation, which allows you to automate sales, marketing, and customer support processes in an integrated and configurable environment.

Introduction

In the current context of international business, the digitization of business processes is not an exclusive phenomenon of large corporations, but a need that permeates with increasing urgency small and medium-sized companies that compete in increasingly dynamic and demanding markets, where the ability to manage information in an agile way, Centralised and traceable represents a tangible competitive advantage, decisive for customer loyalty and business sustainability.

Sergeng Ltda., a Colombian company dedicated to the provision of cleaning, surveillance and maintenance services, was no stranger to this reality, as its commercial growth generated an operational complexity that its manual management tools were unable to absorb efficiently, which resulted in dispersion of information, high response times and a relationship with the customer that, Although it was functional, it lacked the necessary systematicity to consolidate a differentiated and measurable service experience, aspects that are precisely the basis of the value proposition of this business practice.

The implementation of a CRM system, conceived as an internal digital transformation initiative, is the basis of this report that is organized into six chapters, the first presents the context, justification and objectives of the practice, the second the profile of the company and its environment, the third the position held and the functions executed. the fourth is the conceptual and regulatory framework that underpins the project, the fifth is the contributions generated and the improvement plan that has been proposed, and the sixth is about the conclusions and recommendations derived from the experience.

1. Report on business practice in Sergeng Ltda

1.1 Context of business practice

This chapter presents, in an articulated way, the elements that frame the business practice carried out in Sergeng Ltda., from the identification of the organizational need that originated the link to internships to the definition of the objectives that guided its work during the internship period, with the purpose of offering the reader a contextualized understanding of the exercise before delving into the detailed analysis of the company and the contributions generated.

1.2 Justification

Sergeng Ltda. was going through, at the time of the beginning of the internship, a stage of sustained growth of its client portfolio that contrasted with the rigidity of its commercial management tools, based on spreadsheets, email communications without systematized traceability and follow-up processes that depended on the individual criteria of each member of the team. Thus, generating a gap between the capacity for attention and the expectations of an increasingly diverse and demanding clientele.

This situation represented a pertinent opportunity to apply, from the perspective of international business, the knowledge acquired in customer relationship management, service marketing and digital transformation, dimensions that make up the training provided by both the Universidad Santo Tomás and the Audencia Business School, and that find in the implementation of a CRM its most direct expression as a value proposition aimed at measurable results.

The internship was selected as a degree option for its potential to generate an impact on the internal processes of the host organization, while allowing those who are interns to face the challenges in the environment of technological adoption in a Colombian SME, with all the complexities that this implies in terms of resistance to change. availability of resources and organizational culture, this being a learning scenario of high professional value.

1.3 Objectives

The objectives presented below were formulated based on the methodology of Bernal (2000).

1.3.1 General objective

Implement a Customer Relationship Management (CRM) system in Sergeng Ltda. that allows systematizing commercial communication processes and improving loyalty mechanisms, through the centralization of customer information and the automation of follow-up flows.

1.3.2 Specific objectives

The specific objectives constitute the specific milestones whose cumulative fulfillment guarantees the achievement of the general objective (Bernal, 2000, p. 95):

1. Diagnose the current state of customer management processes in Sergeng Ltda., identifying critical points of inefficiency and information gaps.
2. Evaluate and select the CRM platform that best suits the operational, budgetary and strategic needs of the company.

3. Design and configure the selected CRM system, adapting its modules, fields and workflows to the structure and commercial dynamics of Sergeng Ltda.

4. Evaluate the preliminary impact of the pilot implementation using defined performance indicators, in order to measure the adoption of the system and improvements in response times.

2. Company profile

This chapter brings together the constituent elements of the organizational profile of Sergeng Ltda., from its corporate name and corporate purpose to the analysis of its macro and microeconomic environment, with the purpose of providing the reader with a complete frame of reference on the company in which the practice was developed, integrating both the available documentary information and the knowledge generated from direct observation during the period of linkage.

Figure 1. *Sergeng Ltda.'s Business Development Timeline.*



Adapted from Sergeng Ltda., (n.d.)

2.1 Company name

The company operates under the legal name of Sergeng Ltda., a name that corresponds to a Limited Liability Company constituted in accordance with Colombian commercial regulations, a legal figure in which the share capital is divided into shares and the liability of each partner is limited to the amount of his contributions, without compromising his personal assets for the obligations of the company (Chamber of Commerce of Bucaramanga, 2025), which makes it a structure frequently adopted by medium-sized companies seeking legal stability without the complexity of a corporation.

2.2 Corporate purpose of the company

The corporate purpose of Sergeng Ltda. includes the provision of integrated services of cleaning, surveillance, maintenance of facilities and supply of personnel for various operational activities, an offer that allows it to serve a wide segment of institutional clients, including public and private entities from different economic sectors (Sergeng Ltda., 2025), and which is aligned with the ISIC codes corresponding to the activities of building cleaning services. private surveillance and other business support activities.

2.3 Address, telephone, email and immediate supervisor

The contact information and the data of the immediate supervisor are of an institutional nature and are registered in the internship agreement signed between the Universidad Santo Tomás and Sergeng Ltda., as follows:

1. Address: Bucaramanga, Santander, Colombia Cra. 24 #37-11 (hybrid option)
2. Phone: 6076826997

3. Institutional email: kgomez@sergengltda.com

4. Immediate supervisor: Karol Gomez Castillo, Head of CRM department.

2.4 Organizational structure

The organizational structure of Sergeng Ltda. reflects a functional model of medium complexity, in which areas of strategic management, service operation and administrative-commercial support coexist, articulated vertically but with transversal communication channels that favor coordination between dependencies, which is pertinent for a company whose business model demands a rapid operational response to requirements from multiple simultaneous customers.

Figure 2. *Organizational structure of the company.*



Adapted from Sergeng Ltda., (n.d.)

2.4.1 Company mission

Sergeng Ltda.'s mission is to provide comprehensive solutions for cleaning, surveillance and maintenance services with high standards of quality, efficiency and responsibility, with trained human talent, committed to excellence in service and to the well-being of institutional clients who trust the company for the optimal operation of their facilities (Sergeng Ltda., 2025).

2.4.2 Company vision

Sergeng Ltda. plans to consolidate itself as the leading company in the provision of integrated cleaning, surveillance and maintenance services in the Santander region, recognized for the quality of its processes, the stability of its human talent and its ability to adapt to the changing needs of its institutional clients, with a view to a progressive expansion to other regional markets in the country (Sergeng Ltda., 2025).

2.4.3 Company organizational chart

The hierarchical structure of Sergeng Ltda. is headed by the General Management, which is responsible for five large functional areas: Commercial, Operations, CRM, Human Resources and Finance, each with its respective work teams and clearly defined reporting lines, as can be seen in image 2.

2.5 Economic aspects

Sergeng Ltda.'s economic analysis requires considering both the variables of the general environment that indirectly condition its performance, as well as the factors of the immediate environment that directly affect its operational and commercial decisions, a perspective that allows

a more comprehensive understanding of the determinants of its competitiveness in the services market.

2.5.1 Macroeconomic environment

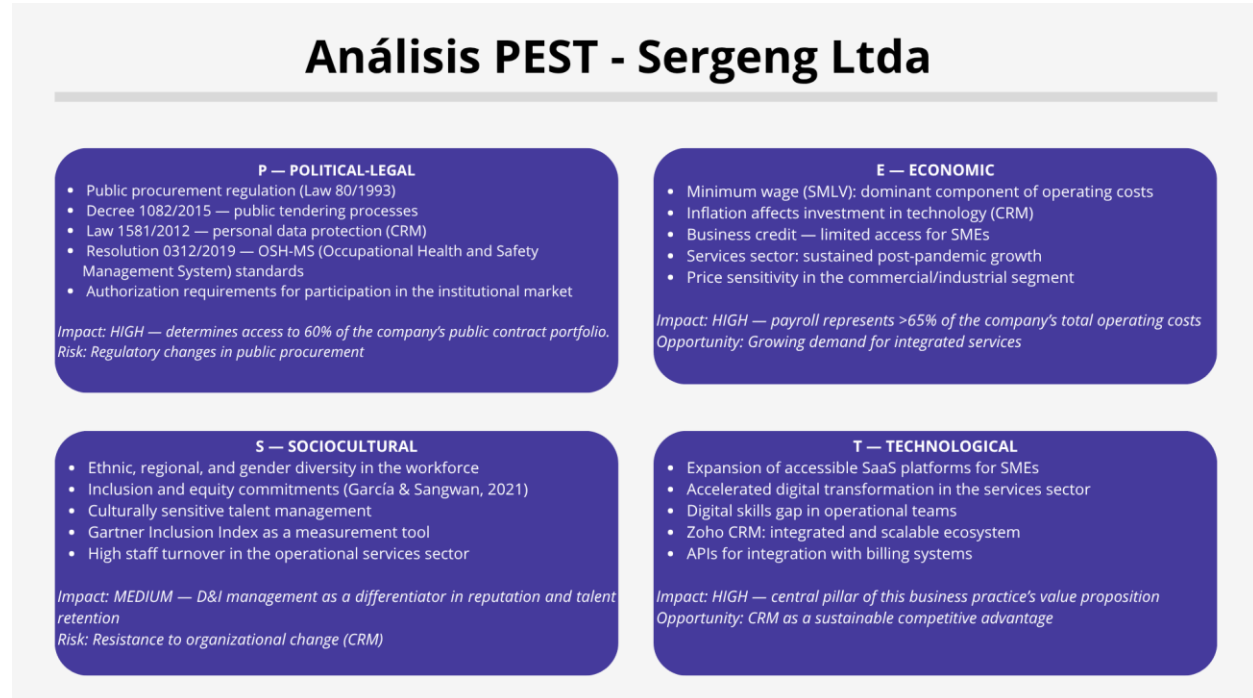
The PEST analysis of the environment in which Sergeng Ltda. operates reveals a set of variables that have a transversal impact on its business model, with special emphasis on the political-legal, economic, socio-cultural and technological factors described below. From the political-legal dimension, the company operates in a context regulated by Colombian public procurement regulations, given that part of its client portfolio corresponds to State entities that tender cleaning and maintenance services in accordance with Law 80 of 1993 and its regulatory decrees, which imposes criteria of qualification, compliance and quality that the company must meet to remain in the institutional market.

Now, speaking on the economic level, it is evident that the fluctuations of the legal minimum wage in force in Colombia are an aspect of observance given that the payroll component represents the largest proportion of Sergeng's operating costs, while inflation and the behavior of business credit condition the capacity to invest in technology and training human talent. which are aspects directly related to the CRM implementation initiative, while the sociocultural dimension is important for its analysis of diversity and labor inclusion, an area in which Sergeng has assumed several commitments since its workforce reflects the ethnic, regional and gender diversity of Colombian society. which demands talent management policies that are culturally sensitive and promote equity (Garg & Sangwan, 2021).

In addition, and from a technological perspective, the acceleration of digital transformation in the service sector, driven by the expansion of SaaS platforms accessible to SMEs, represents

two things, both an opportunity for modernization and a challenge for adoption, since there is an immense difference in digital skills in operational teams, something that is a limiting factor and that the company must actively manage to ensure the success of initiatives such as the implementation of the CRM.

Figure 3. *PEST analysis of the macroeconomic environment of Sergeng Ltda.*



Adapted and based on analysis of the environment by Sergeng Ltda. (2025).

2.5.2 Microeconomic environment

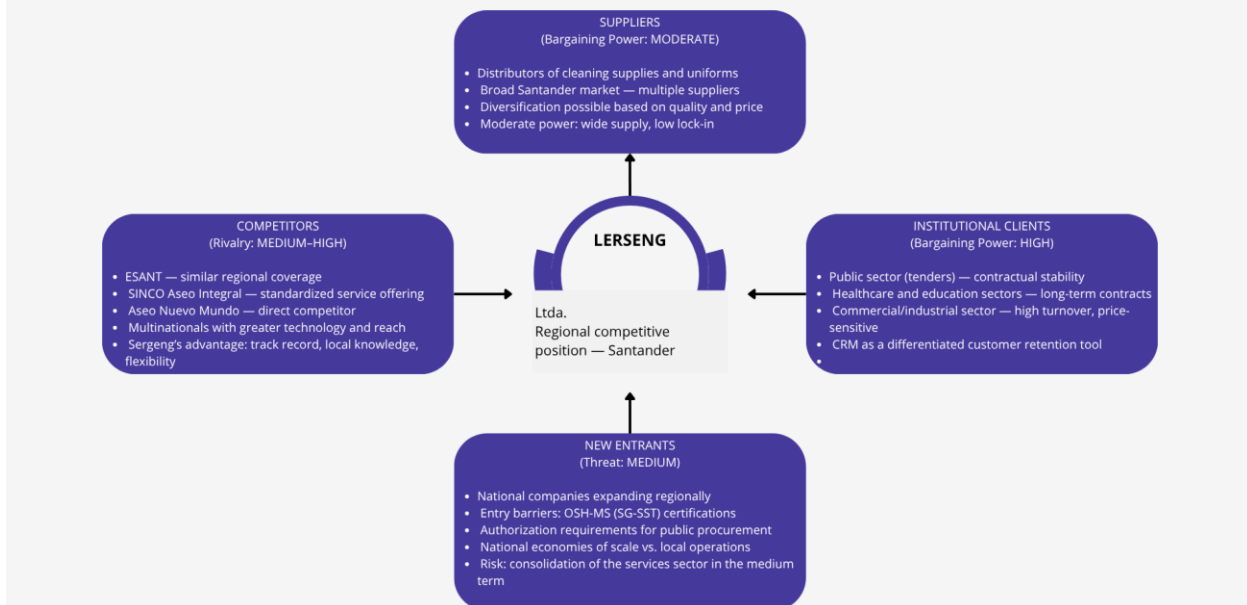
If the immediate environment of Sergeng Ltda. Four groups of actors can be found that determine the competitive dynamics of the company, these are suppliers, intermediaries, customers and competitors, but let's explain them one by one, as for suppliers, Sergeng depends on companies that distribute cleaning supplies, uniforms and maintenance equipment, whose offer in the

Santander market is relatively wide and is what gives the company moderate bargaining power and the possibility of to diversify their sources of supply according to quality and price.

In second place is Sergeng's customer segment, which is mainly composed of public and private entities in the health, education, commerce and industry sectors, with service provision contracts of variable duration, which generates a portfolio with different levels of loyalty and service requirements, a situation that gives rise precisely to the implementation of a CRM as a differentiated management tool. In third place and on the competitive front, Sergeng competes with other integrated services companies in the region, but stands out for its trajectory, knowledge of the local market and operational flexibility, although it faces competitors with greater technological resources and national coverage that offer more standardized value propositions.

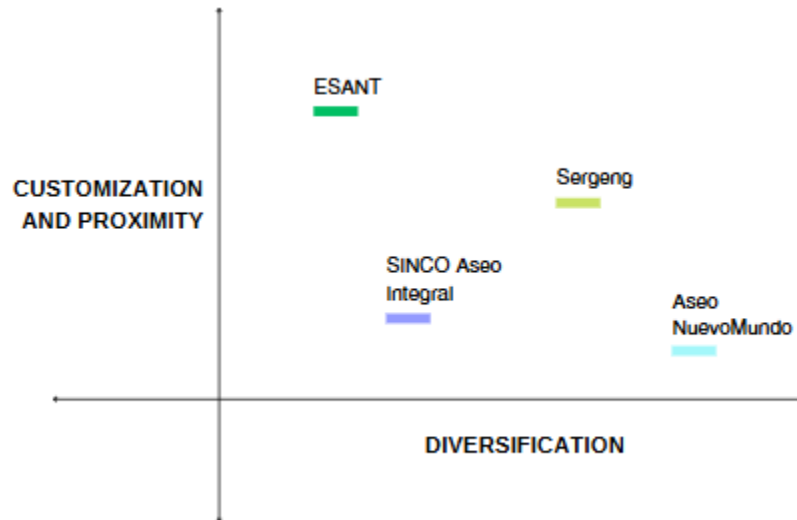
Figure 4. *Sergeng Ltda.'s microeconomic environment - Analysis of Competitive Forces.*

Microeconomic Environment — Competitive Forces of Sergeng Ltda



Adapted from Sergeng (2025.)

Figure 5. *Sergeng Ltda.'s competitive positioning matrix.*



Figure's 5 matrix compares Sergeng Ltda. with other companies in the sector (ESANT, SINCO Aseo Integral and Aseo Nuevo Mundo) according to the axes of diversification and personalization or proximity of the service.

2.6 Portfolio of products and/or services of the company

Sergeng Ltda.'s portfolio comprises four main lines of service that are cleaning and cleaning of industrial, commercial and institutional facilities, surveillance and physical security, preventive and corrective maintenance of buildings and infrastructure, and supply of operational personnel for logistical support activities, lines that together allow it to offer comprehensive solutions that meet the operational needs of its institutional clients under marketing schemes. medium and long-term contract (Sergeng Ltda., 2025).

2.7 Aspects of the market served by the company

The market served by Sergeng Ltda. is characterized by an institutional demand that combines public sector clients, subject to bidding processes and regulatory compliance

requirements, with private sector clients, whose contracting responds to criteria of efficiency, trust and cost-benefit ratio, which configures a dual market environment that demands from the company differentiated commercial management capabilities for each segment.

When looking at the customer segments, it is evident that companies in the health and education sectors represent the contracts with the greatest stability and duration, on the other hand, the commercial and industrial sector shows a greater turnover and more sensitivity to price, which implies for Sergeng the imperative need to design loyalty strategies that the CRM implemented is aimed at facilitating by allowing the individualized monitoring of each account and the Personalization of commercial communication.

3. Position and functions performed

This chapter describes, with precision and detail, the position he held during his tenure at Sergeng Ltda., the functions assigned to him and the processes, procedures and tools he used in the exercise of his role, thus offering a complete x-ray of the professional performance that supports the contributions developed in the following chapter.

3.1 Position held

During the internship, the relationship was under the name of CRM Assistant, a position assigned to the commercial area of the company, whose central responsibility was to lead the process of diagnosis, selection, configuration and implementation of the customer relationship management system, in direct coordination with the sales, customer support and general management teams of Sergeng Ltda. (USTA-Sergeng practice agreement, 2025).

3.2 Assigned roles

The functions performed during the internship period can be organized into the following categories:

1. Diagnose the current customer service and follow-up processes, through interviews with the sales team and analysis of the tools previously used.
2. Support the comparative evaluation of CRM platforms available in the market, analyzing criteria of functionality, cost, scalability and integration with existing systems.
3. Actively participate in the configuration and customization of Zoho CRM, adapting its modules and workflows to the commercial structure that the Sergeng company has.
4. Collaborate in the process of cleaning, organizing and migrating the data of the client portfolio to the new platform in order to guarantee the integrity and consistency of the transferred information.
5. Design and coordinate training materials for the sales team, including user guides, tutorials and induction sessions to the platform.
6. Monitor the performance indicators of the implementation pilot, analyzing the results and proposing adjustments aimed at optimizing the adoption of the system.

Table 1. *List of assigned roles and weekly hours spent*

<i>Function</i>	<i>Weekly hours</i>
Diagnosis of customer management processes	8
Evaluation and selection of CRM platforms	6
Zoho CRM Setup & Customization	12
Customer Data Cleansing and Migration	8
Design of training and training materials	6
Monitoring of pilot indicators	6
Coordination meetings with the sales team	2
Total	48

Adapted based on the USTA-Sergeng Ltda. practice agreement (2025).

3.3 Processes, procedures and tools

The practice involved participation in processes of different nature, the understanding of which requires distinguishing between the three concepts that articulate this number: the process, understood as any activity or set of activities that transforms inputs into results (Robledo, 2017, para. 2), the procedure, which is the specific way in which said process must be executed (2017, para. 4), and the tool, which corresponds to the essential goods and platforms that the worker uses to provide the agreed service (VLex, 2016, para. 7). The central processes in which we participated during the internship were the commercial management of clients, the organizational diagnosis and the management of technological change, each with associated procedures ranging from the application of semi-structured interviews for the collection of information, to the execution of data cleaning and migration protocols and the implementation of indicator monitoring routines in the CRM dashboard.

The main tools used during the practice included Zoho CRM as the central customer relationship management platform, Zoho Forms for the design of data collection forms, Google Sheets for consolidation and preliminary analysis of information before migration, and presentation tools for the design of training materials for the sales team, a set of resources that in their articulation configured the digital ecosystem on which the value proposition of the practice rested.

4. Conceptual and regulatory framework

This chapter exposes the conceptual foundations and the normative context that frame the value proposition developed during the practice, offering the reader the theoretical categories necessary to understand the logic underlying the implementation of CRM in Sergeng Ltda. and the legal frameworks that condition this initiative in the Colombian context.

4.1 Conceptual framework

The conceptual framework of this report articulates three major thematic axes directly linked to the object of the practice, which are customer relationship management, performance indicators in services, and diversity and inclusion in organizational environments.

Customer Relationship Management, conceptualized from the CRM paradigm, is understood as a strategic approach that integrates technology, processes, and people to maximize the value of customer interactions throughout their entire life cycle with the organization, with the purpose of increasing retention, improving the service experience, and generating actionable information for business decision-making (Zoho Corporation, 2023).

Performance indicators, or KPIs, are the mechanism through which the organization verifies progress towards its strategic and operational objectives, being in the context of a CRM of observance in terms of metrics such as the average response time to customer inquiries, the conversion rate of business opportunities, the Net Promoter Score (NPS) and the customer retention rate, indicators that allow the impact of technological implementation in measurable business terms to be objective.

In order to illustrate the calculation of the main indicators applicable to the context of Sergeng Ltda., their respective mathematical formulations are presented below with examples of calculations based on illustrative data:

a) Average Response Time (RTP):

$$TRP = \sum (\text{Response Time Per Query}) / \text{Total Number of Inquiries Handled}$$

Example: In month 1 post-implementation, 30 customer inquiries with summed response times = 450 hours. $TRP = 450 / 30 = 15$ hours on average. In month 3, with automated processes, the same calculation could yield $TRP = 270 / 30 = 9$ hours (-40%).

b) Net Promoter Score (NPS):

$$NPS = \% \text{ Promoters (score 9-10)} - \% \text{ Detractors (score 0-6)}$$

Example: Out of 50 customers surveyed, 30 are promoters (60%), 10 are passive (20%) and 10 are detractors (20%). $NPS = 60\% - 20\% = +40$. An NPS above +30 is considered good in the B2B services sector.

c) Customer retention rate (CRR):

$$TRC (\%) = (Customers \text{ at end of period} - New \text{ customers}) / (Customers \text{ at start of period}) \times 100$$

Example: Sergeng starts the quarter with 45 active customers, closes with 48 and acquired 8 new ones. $CRT = ((48 - 8) / 45) \times 100 = (40 / 45) \times 100 = 88.9\%$. A reasonable goal for the sector is to maintain $TRC \geq 85\%$ per year.

d) Business Opportunity Conversion Rate (TCO):

$$TCO (\%) = (Opportunities \text{ Successfully Closed} / Total \text{ Opportunities Recorded in the Period}) \times 100$$

Example: In the semester after implementing the CRM, Sergeng registered 25 business opportunities on Zoho, of which 18 were converted into signed contracts. $TCO = (18 / 25) \times 100 = 72\%$. These indicators together make up the dashboard for measuring the impact of CRM on the commercial management of Sergeng Ltda.

The analysis of diversity and inclusion in the environment of Sergeng Ltda. is incorporated into the conceptual framework based on the review of specialized literature which indicates that organizations that actively manage the diversity of their workforce obtain advantages in terms of innovation, organizational climate and reputation before their stakeholders (Garg & Sangwan, 2021), which is relevant for a company whose human capital is its main differentiating asset in a labour-intensive sector; additionally, measuring inclusion through tools such as the Gartner Inclusion Index allows organizations to translate declarative commitments into actionable data that guide concrete improvements in talent management (Romansky et al., 2021).

Service marketing is frankly another aspect that is necessary to understand the value proposition of this practice, given that, unlike the marketing of tangible goods, service marketing operates on intrinsic characteristics such as intangibility, inseparability between production and consumption, heterogeneity and expiration, dimensions that Zeithaml, Bitner and Gremler (2018) group under the 7P model of service marketing. being the process, people and physical evidence the elements that most frequently determine the perception of quality by the customer in companies such as Sergeng Ltda., whose offer rests precisely on the consistency of the service and on the trust generated throughout the commercial relationship, which is why the implementation of CRM is a direct intervention on the management of the customer experience as a marketing variable.

Organizational change, on the other hand, is understood in this report as the planned process by which an organization transitions from a present state to a desired state, modifying its processes, structures, technologies or culture in an intentional and managed way (Kotter, 1996), a concept that is inseparable from the implementation of CRM in Sergeng Ltda., since the adoption of any new technology in an SME is more than anything else the capacity of the organization to

manage the natural resistance to change, maintain institutional commitment throughout the process and build the necessary competencies in the teams involved, aspects that conditioned the design of the training phases and the proposed improvement plan.

4.2 Regulatory framework

The regulatory framework that frames the business practice in Sergeng Ltda. includes regulations from four different areas that are interrelated with the activities carried out, which will be addressed one by one.

First, the Substantive Labor Code of Colombia regulates the employment relationship of Sergeng's personnel and, by extension, the conditions of the business practice, establishing the rights and obligations of the parties within the framework of the internship agreement.

Secondly, we have Law 1581 of 2012 or known as the Personal Data Protection Law, this is of great observance in terms of the implementation of CRM, since the platform centralizes personal information of customers and business contacts, which imposes on Sergeng the obligation to obtain explicit authorization for the processing of such data, define a privacy policy and guarantee mechanisms for access, correction and deletion of information by the holders.

Third, Law 80 of 1993 and Decree 1082 of 2015 regulate the public procurement and contracting system in Colombia, establishing the requirements that companies such as Sergeng must meet to participate in bidding processes with state entities, thus conditioning part of their commercial strategy and the management of institutional clients in the public sector.

Finally, Resolution 0312 of 2019, which defines the minimum standards of the Occupational Health and Safety Management System, is applicable to the company's operational

activities and constituted a regulatory reference that was taken into account in the analysis of internal processes during practice.

5. Contributions

5.1 Value-added proposition to the company

The central value proposition of this practice consisted of the implementation of a CRM system that would transform the commercial management of Sergeng Ltda, from a manual and highly dispersed model to a digitized, centralized and traceable one, following a four-phase methodology that is described in detail in the following paragraphs.

5.1.1 Identification of the problematic situation

The initial diagnosis, carried out through semi-structured interviews with the sales team and the management of Sergeng Ltda., as well as through direct observation of the workflows of the area, allowed the identification of four problems which can be considered central that affected the efficiency of customer management, these are, therefore, the dispersion of contact and contract information in multiple spreadsheets without version control, the absence of a system for monitoring commercial opportunities that would allow identifying at what stage of the cycle each potential customer was, the dependence on the individual knowledge of each advisor for the management of their accounts (generating a risk of loss of information due to staff turnover) and the lack of metrics that would allow objectively measuring the performance of the commercial area and customer satisfaction (Sergeng internal diagnosis, 2025).

These findings were systematized in a process diagnostic table that cross-referenced each business activity with its level of digital maturity, the resources involved, the most critical points

identified and the associated opportunities for improvement, an instrument that served as an input for the selection of the CRM platform and the design of its configuration (see Appendix A).

5.1.2 Contribution of knowledge to the company

The knowledge contribution to Sergeng Ltda. was structured in four consecutive and articulated phases, each of which generated concrete products that were made available to the company at the end of the internship period.

5.1.2.1 Evaluation and selection of the CRM platform. Based on the findings of the diagnosis, a comparative evaluation of three CRM platforms was carried out, considering criteria of functionality for the service sector, cost of licensing, ease of use for equipment without high digital competence, integration capabilities with tools already used by the company and support available in Spanish, evaluation of which Zoho CRM was selected for its balance between functionality, economic accessibility and adaptability to the operational scale of an SME such as Sergeng (see Appendix B).

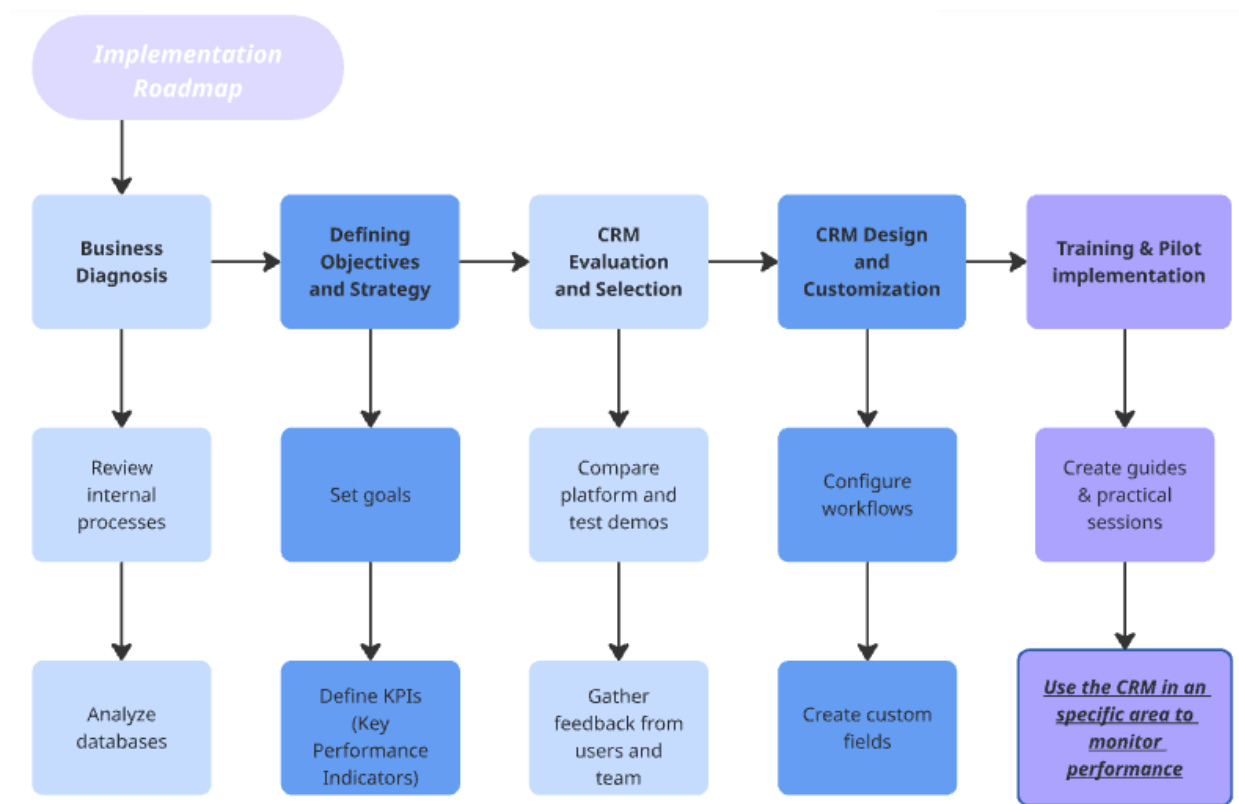
5.1.2.2 System Configuration and Customization. The configuration of Zoho CRM involved the creation of custom modules for Sergeng's customer segments, the design of automated workflows for the tracking of business opportunities, the parameterization of information fields aligned with the company's contract structure, and the construction of a dashboard that consolidated the priority KPIs defined with the commercial management, including average response time, number of active opportunities per advisor, and contract renewal rate (see Appendix C).

5.1.2.3 Cleanup, Migration, and Training. Prior to the data migration, a process of purging the existing customer base was carried out, eliminating duplicates, filling in empty fields and standardizing information formats, work that was supported by Zoho Forms for the capture of updated data directly from the commercial advisors, and that resulted in a clean and structured database migrated to the platform. on which the training materials and team training sessions were developed (see Appendix D).

5.1.3 Impact from results and/or achievements

The preliminary results of the implementation pilot, measured at the end of the internship period, showed improvements in three dimensions of Sergeng's business performance, a reduction in the average response time to customer inquiries, derived from the centralization of information and the automation of follow-up alerts, an increase in the adoption rate of the system by the sales team, and an improvement in the quality and consistency of customer data.

At this point, it is important to note that since the implementation was in the pilot phase at the end of the practice, the results correspond only to preliminary indicators and observed trends, and that the consolidation of the full impact of the system will depend on the continuity of the adoption process and the sustained management of organizational change by the management of Sergeng Ltda., that is precisely the basis of the recommendations of the improvement plan, however the beneficial potential for the company can be foreseen from the pilot test.

Figure 6. *Sergeng CRM Strategy Implementation Roadmap.*

The figure shows the main stages of the CRM implementation plan, business diagnosis, definition of objectives and strategy, evaluation and selection of the CRM, design and customization, and training and pilot implementation, along with its key activities, in order to illustrate the steps and the general schedule of the project, is in English because it was delivered to the company.

5.2 Company contributions to the training process

The experience in Sergeng Ltda. It was extremely enriching and provided a set of technical and transversal skills that complement and enrich the academic training received at the Universidad Santo Tomás and at the Audencia Business School, generating a highly complete and relevant professional profile for the labor market, on the technical level, the practice allowed to develop skills in the administration of CRM platforms, the analysis and interpretation of

commercial management indicators, the design of cleaning processes and migration of databases, and the development of pedagogical materials aimed at the training of non-technical users, skills that are very difficult to acquire in the classroom since they are only born from exercise and that have a high value in the current labor market, in terms of transversal competencies, Sergeng Ltda.'s environment offered invaluable training in organizational change management, assertive communication with work teams of different hierarchical levels, adaptability in the face of the uncertainty inherent in digital transformation projects in organizations with limited resources, and interdepartmental work in environments where collaboration must be intentionally built.

5.3 Improvement plan

The improvement plan presented below materializes the recommendations derived from the internship period and organizes in three sub-axes of action the interventions that Sergeng Ltda. should prioritize in the next six months to ensure the sustainability of the impact of the CRM and the evolution of the system towards a commercial management tool fully integrated into the company's operational culture. Each axis is developed with its respective goals, actions, indicators, responsible resources and schedule, which are further summarized in Table 2 at the end of the section.

5.3.1 Sustained CRM adoption by the sales team

The sustainability of any technological implementation in an SME rests, in the first place, on the effective adoption of the system by the end users, which is why this axis is the most urgent priority of the improvement plan. The goal of this axis is to achieve an active use of the CRM by 100% of the sales team within the first ninety days after the end of the practice, understanding

"active use" as the weekly record of at least one interaction with customers on the platform per linked advisor. To achieve this, it is proposed to hold fortnightly reinforcement sessions that combine review of operational doubts with review of dashboard indicators, the formal designation of an internal CRM Champion to act as a technical and motivational reference for the team, and the establishment of a recognition scheme for the most active users that positively reinforces adoption behavior (Kotter, 1996).

The indicator that will allow verifying the progress of this axis is the adoption rate of the system, defined as the percentage of commercial advisors with at least one active registration in the week. Its mathematical formulation is as follows:

$$\text{Adoption Rate (\%)} = (\text{Active Registered Advisors} / \text{Total Advisors}) \times 100$$

Illustrative example: If in week 4 of the follow-up, 5 of the 7 advisors have registered at least one interaction, the adoption rate would be: $(5 / 7) \times 100 = 71.4\%$. The goal at month 3 is to reach 100%.

The monitoring of this indicator will be carried out monthly through the Zoho CRM dashboard, and its results will be reported to the commercial management. The main responsible is the designated CRM Champion, with support from the Commercial Area, and the resource required consists mainly of the time spent on the sessions (approximately 4 hours per week of the CRM Champion). The timeline of this axis extends from month 1 to month 3 of the post-internship period.

5.3.2 *Quality and integrity of customer data*

Data quality is the necessary condition for CRM to fulfill its strategic function: without complete and updated information, dashboard analytics are invalid and automations are not activated correctly. For this reason, the second axis of the improvement plan focuses on guaranteeing the integrity of the customer database, with a specific goal of reducing records with incomplete critical fields to 5% or less during the first six months of operation. Associated actions include implementing a mandatory entry protocol for fields defined as critical (name, industry, contact person, email, phone, and contract status), performing monthly database audits using native Zoho CRM reports, and setting up an automatic alert flow that notifies CRM Champion when a new record has empty fields.

The central indicator of this axis is the record completion rate, which is formulated as follows:

$$\text{Completion rate (\%)} = (\text{Records with all critical fields complete} / \text{Total records}) \times 100$$

Illustrative example: At the end of month 2, if out of 120 active customer records in Zoho CRM, 108 present all critical fields complete, the completion rate is: $(108 / 120) \times 100 = 90\%$. The goal at month 6 is $\geq 95\%$.

This indicator will be reported monthly through the Zoho CRM reporting module. The main responsible is the CRM Champion with the support of the IT team, and the necessary resources consist of additional configuration of mandatory fields on the platform at no extra licensing cost. The schedule of this axis extends from month 2 to month 6 of the post-internship period.

5.3.3 Advanced Trade Tracking Automation

The third axis of the improvement plan addresses the highest level of maturity of the implementation: the progressive automation of commercial follow-up flows, so that the CRM does not simply function as a repository of information but as a proactive customer management engine. The goal of this axis is to automate at least 80% of follow-up notifications and alerts within the first six months, thus reducing reliance on manual action by advisors for the management of their accounts. The proposed actions include the exhaustive mapping of the current follow-up flows (identifying in which cases the advisor intervenes manually on a recurring basis), the design and configuration of automation rules in Zoho CRM for the most frequent cases, and the performance of controlled tests before the final activation of each automated flow.

The indicator that allows the progress of this axis to be measured is the tracking automation rate, which is calculated as follows:

$$\text{Automation Rate (\%)} = (\text{Automation-Managed Follow-Ups} / \text{Total Follow-Ups for the Period}) \times 100$$

Illustrative example: In month 5, if out of 200 follow-up actions registered in Zoho CRM, 172 were triggered automatically (without manual intervention of the advisor), the automation rate would be: $(172 / 200) \times 100 = 86\%$, exceeding the goal of 80%.

This indicator will be reviewed quarterly by the CRM Champion and the Commercial Management. The required resources include 8 hours of initial technical setup plus Zoho's automation module, the cost of which is included in the platform's current subscription plan. The schedule of this axis goes from month 3 to month 6 of the post-internship period. The three axes are presented synthetically in Table 2 below.

Table 2. *Proposed improvement plan*

<i>Aspect to improve</i>	<i>Goals</i>	<i>Actions</i>	<i>Indicator</i>	<i>Do/Verify</i>	<i>Responsible</i>	<i>Resources</i>	<i>Schedule</i>
Sustained CRM adoption by the sales team	Achieve 100% active use of equipment in 90 days	Bi-weekly reinforcement sessions, assignment of an internal CRM Champion, recognition of the most active users	Adoption rate (% of advisors with active weekly registration)	Monthly monitoring in the dashboard, report to management	CRM Champion / Commercial Area	CRM Champion Time (4h/week)	Months 1 to 3
Quality and integrity of customer data	Reduce incomplete records to 5% or less in 6 months	Mandatory Critical Field Entry Protocol, Monthly Database Audit, Alert Flow for Missing Data	% of complete records in the defined critical fields	Monthly data quality report generated from Zoho CRM	CRM Champion / IT	Additional setup in Zoho (at no extra cost)	Months 2 to 6
Advanced trade tracking automation	Automate 80% of follow-up notifications within 6 months	Mapping current tracking flows, designing automation rules in Zoho, testing and tuning flows	% of follow-ups managed by automation s vs. manual action	Quarterly review of active flows and effectiveness of automations	CRM Champion / Commercial Management	Setup Time (8h) + Zoho Automation Module	Months 3 to 6

Adapted from Sergeng (2025.)

Figure 7. *Gantt chart of the activities carried out during the practice.***Gantt Chart — Business Internship at Sergeng Ltda. (16 weeks)**

Task / Activity	Business Internship at Sergeng Ltda. (16 weeks)															
	w1	w2	w3	w4	w5	w6	w7	w8	w9	w10	w11	w12	w13	w14	w15	w16
PHASE 1: Initial Diagnosis																
1.1 Interviews with sales team and management — S1-S3																
1.2 Direct observation of workflows — S1-S2																
1.3 Analysis of existing tools — S2-S3																
PHASE 2: CRM Evaluation and Selection																
2.1 Comparative evaluation of platforms (Zoho, HubSpot, Salesforce) — S3-S5																
2.2 Selection of Zoho CRM — criteria report — S4-S5																
PHASE 3: System Configuration and Customization																
3.1 Design of modules and automated workflows — S6-S10																
3.2 KPI dashboard development — S7-S10																
3.3 Data cleaning and migration — S6-S11																
PHASE 4: Training and Pilot Implementation																
4.1 Design of training materials and sessions — S10-S13																
4.2 Pilot implementation with client sample — S12-S14																
4.3 Monitoring of indicators and system adjustments — S13-S16																

Note: Diagram showing the four phases of the project (Diagnosis, Assessment and Selection, Configuration and Customization, and Training and Pilot Implementation) with their activities and weeks of execution.

6. Conclusions and recommendations

The business practice developed in Sergeng Ltda., with whom it only remains to give my most sincere thanks for such magnanimous experience, allowed us to verify, from experience, that the digital transformation in Colombian SMEs in the service sector is not a linear or exclusively technological process, it is rather an initiative that demands change management, institutional leadership and a precise understanding of the organizational processes that are sought to be transformed, dimensions that constitute the core of the reflections presented below. In relation to the general objective, we see that the implementation of Zoho CRM in Sergeng Ltda. advanced satisfactorily to the pilot phase, managing to centralize customer information, automate basic

follow-up flows and provide the sales team with a dashboard with performance indicators that simply did not exist before, which represents a qualitative leap in terms of the digital maturity of the company and lays the foundations. For a more analytical, systematic and results-oriented commercial management, with respect to the specific objectives, the initial diagnosis turned out to be the most decisive phase of the process since the clarity with which the management gaps were identified favorably conditioned the selection of the platform and the design of its configuration, which confirms that in technological implementation projects the investment of time in the previous analysis has a fairly multiplied return. In the quality of the solutions deployed, however, the main limitation identified during the practice was the initial resistance of the sales team to the change of tools, but this is even a phenomenon that the literature on organizational change management points out as predictable and manageable when accompanied by communication, training and recognition processes (Romansky et al., 2021), which is why the improvement plan prioritizes the figure of the CRM Champion as a mechanism to sustain adoption in the medium term.

As recommendations for Sergeng Ltda., it is suggested to maintain the investment in continuous training of the team in the use of the CRM, formally appoint an internal manager of the platform, establish a routine of monthly review of the dashboard indicators so that the information generated by the system is effectively translated into commercial decisions, and explore in the medium term the integration of the CRM with the company's invoicing and contract management tools. Thus, expanding the value of the digital ecosystem built.

Finally, the double degree experience that framed this internship considerably enriched the perspective with which the project was approached, by combining the methodological rigor and international approach of the Audencia Business School with the practical guidelines and

sensitivity to the Colombian context provided by the training of the Universidad Santo Tomás, a synthesis that throughout the practice was considered the main asset for their future integration into the labor market of international business.

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Appendices

Appendix A. *Interviews for the diagnosis of customer management processes.*

Interview 1: Juan P. – Zonal Manager

Topic: Feedback and Improvements

Question: How do you use CRM data to improve?

Answer:

"Digitalization has allowed us to respond faster and more accurately to the needs of our customers. We analyze CRM reports to identify trends and adjust processes."

Topic: Loyalty

Question: What strategies have worked best to generate loyalty?

Answer:

"Loyalty campaigns help renew contracts and measure customer satisfaction. We also carry out after-sales follow-up and periodic visits."

Topic: Innovation and continuous improvement

Question: How do you perceive the impact of digitalization on the quality of service?

Answer:

"Digitalization has allowed us to respond faster and more accurately to the needs of our customers. CRM has greatly improved internal coordination."

Topic: Training and Human Resources

Question: How important is staff training in service quality?

Answer:

"The continuous improvement of the service depends on the training and motivation of the team. It is essential to invest in training."

Topic: Quality and communication

Question: What aspects do you value most in the relationship with Sergeng Ltda?

Answer:

"Punctuality and clear communication in service delivery are critical to us."

Interview 2: María G. – Operations Manager

Topic: Feedback and Improvements

Question: How do you use CRM data to improve?

Answer:

"We use the information from the CRM to detect areas for improvement in the service and train staff according to the identified needs."

Topic: Loyalty

Question: What strategies have worked best to generate loyalty?

Answer:

"After-sales follow-up and personalized attention have been key to keeping customers satisfied and loyal."

Topic: Innovation and continuous improvement

Question: How do you perceive the impact of digitalization on the quality of service?

Answer:

"Technological innovation is key to staying competitive and continuously improving our service. The CRM has given us more control and visibility."

Topic: Training and Human Resources

Question: How important is staff training in service quality?

Answer:

"Our team is the heart of Sergeng; investing in their training is investing in quality."

Topic: Quality and communication

Question: What aspects do you value most in the relationship with Sergeng Ltda?

Answer:

"The efficient management of human resources allows us to offer a quality service adapted to each client."

Interview 3: Carlos R. – Corporate Client

Topic: Feedback and Improvements

Question: How do you use CRM data to improve?

Answer:

"I like to be asked for feedback and then see changes in the service based on my suggestions."

Topic: Loyalty

Question: What strategies have worked best to generate loyalty?

Answer:

"They sent me a welcome kit and are always attentive to my needs, which makes me feel valued."

Topic: Innovation and continuous improvement

Question: How do you perceive the impact of digitalization on the quality of service?

Answer:

"Punctuality and clear communication are what I value most in the service, and that has improved since using CRM."

Topic: Training and Human Resources

Question: How important is staff training in service quality?

Answer:

"I really appreciate that the staff is well trained and always willing to help. You can tell when there is training."

Topic: Quality and communication

Question: What aspects do you value most in the relationship with Sergeng Ltda?

Answer:

"With Sergeng we know that every detail is covered and that we can always count on them."

Semi-structured instrument used during the diagnostic phase to collect information on the current processes of customer service and follow-up in the commercial area of Sergeng Ltda.

Appendix B. *CRM platform benchmarking matrix.*

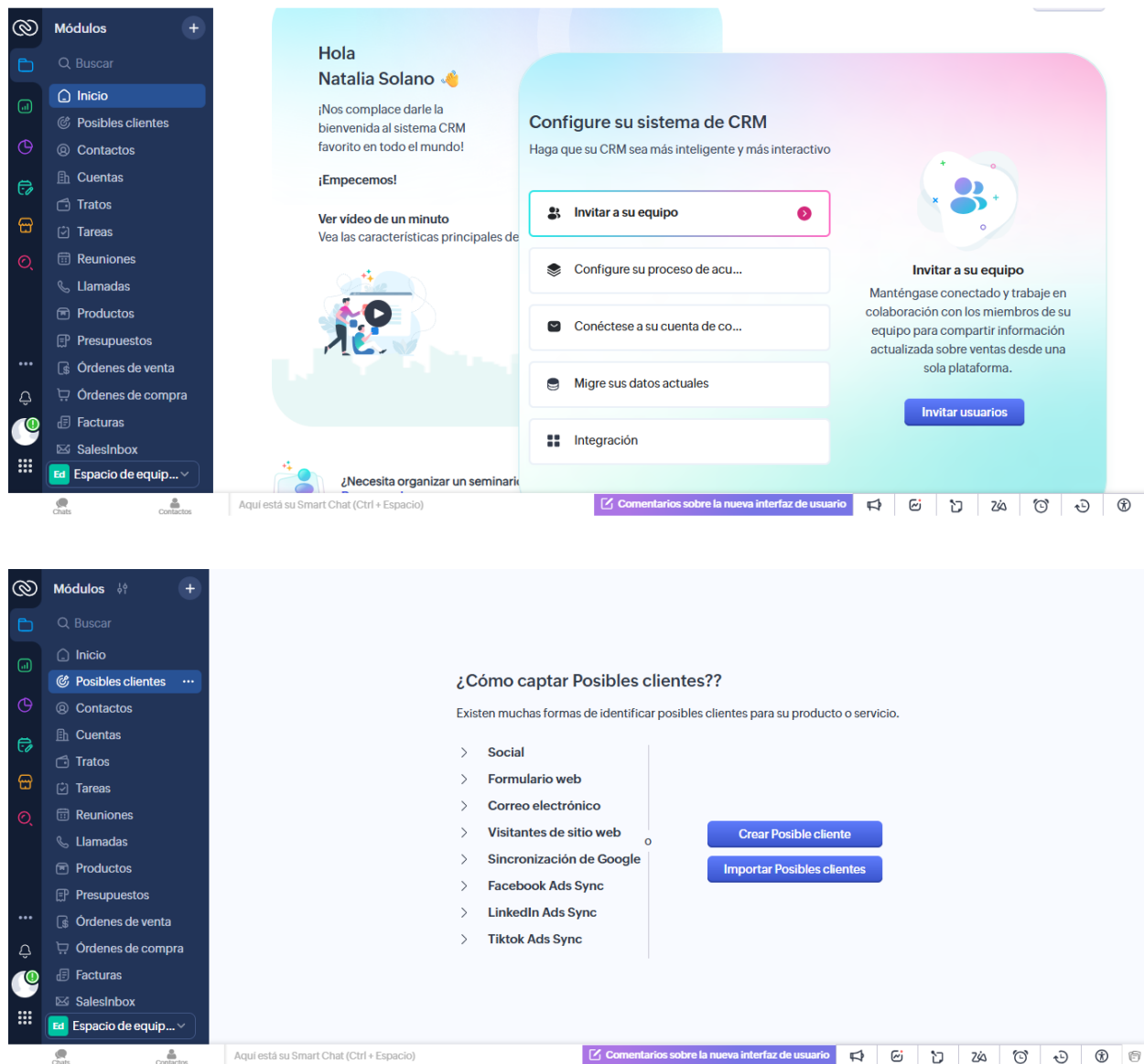
Multi-criteria analysis table comparing Zoho CRM, HubSpot, and Salesforce platforms based on functionality, cost, ease of use, integration, and support, used to inform Zoho CRM's selection. Source: own elaboration (2025).

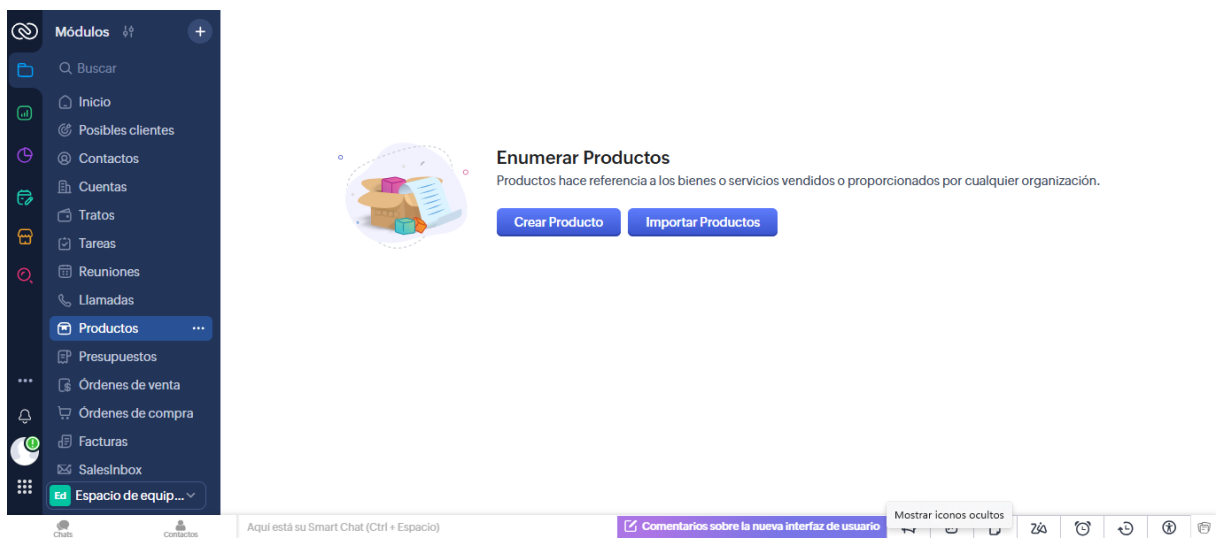
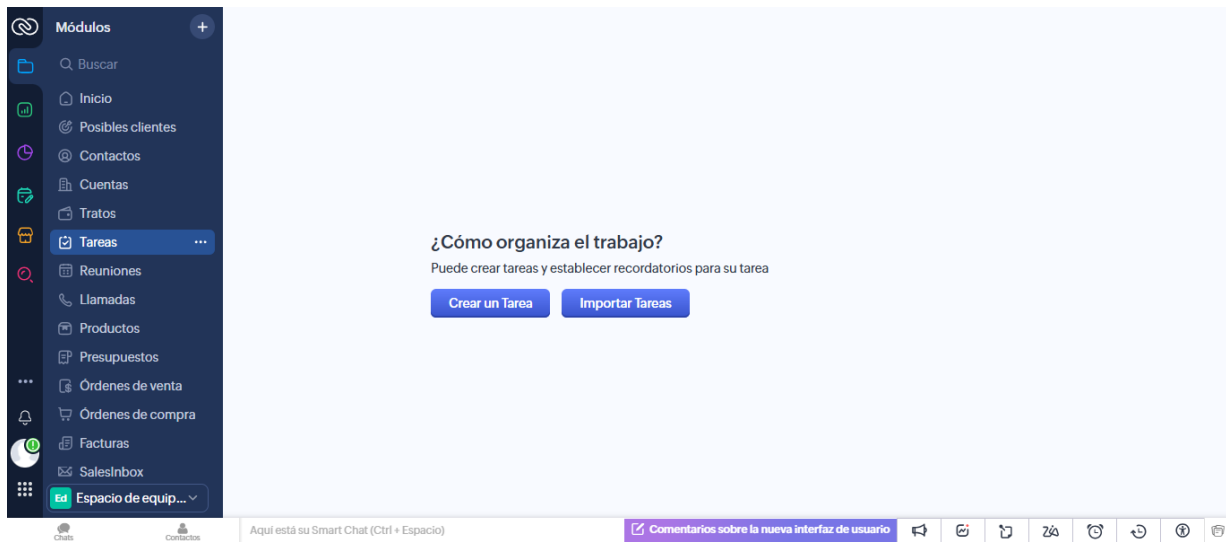
Criteria	Zoho CRM	HubSpot CRM	Salesforce
SMB Functionality	High: complete sales modules, automation and adaptable reports	Media: Free basic features, advanced with a cost	Very high: it's good but complex
Licensing Cost	Low – accessible for SMEs	Medium – scalable but increasing rapidly	High – geared towards large enterprises
Ease of use	High: Intuitive and responsive interface	Very high: easy to use in basic version	Medium-low: requires technical training
Customizability	High: allows modules, fields and flows to be adapted	Medium: Limited on free versions	Very high: highly configurable
Integration with other tools	High: Integration with Zoho Suite and external apps	High: Good integration with marketing tools	Very high: broad business ecosystem
Spanish Support	Yes: support and documentation in Spanish	Partial: Limited support in free version	Yes: Full enterprise support
Scalability	High: grows with the company	Medium-high: depends on the plan contracted	Very high: designed for large operations
Adaptation to Sergeng Ltda.	Very high: balance between cost, functionality and ease of use	Medium: Useful but limited without payment	Baja: the truth is oversized for the company

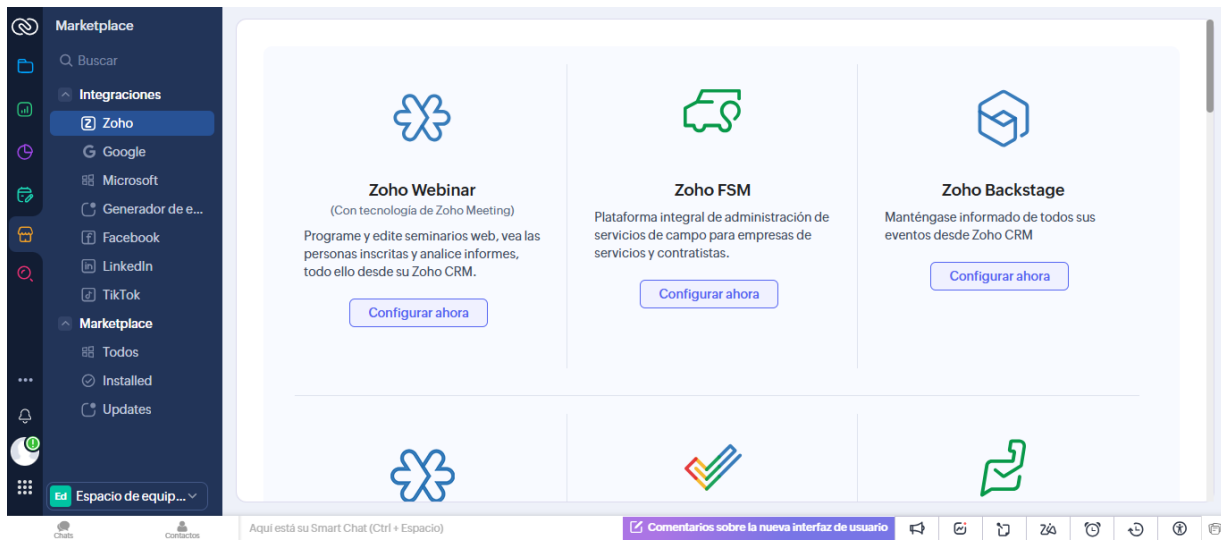
Appendix C. Screenshots of the dashboard set up in Zoho CRM.

Visual evidence of the configuration of the control panel implemented in Zoho CRM for the commercial area of Sergeng Ltda., showing the modules of customers, opportunities and KPIs.

Adapted from Sergeng Ltda. (2025).







Net Promoter Score

1. On a scale of 0 to 10, how likely are you to recommend this brand to your colleague or friend?

0 - Not at all likely
10 - Extremely Likely

0

1

2

3

4

5

6

7

8

9

10

Submit

Appendix D. *Summary table of training materials for the sales team that were delivered.*

User guides and training presentations designed to introduce the sales team to Zoho CRM, including step-by-step workflows and FAQs.

<i>Training Module</i>	<i>Contents</i>	<i>Objective</i>	<i>Tool used</i>	<i>Material Type</i>
Introduction to CRM	CRM concept, benefits for Sergeng Ltda., importance of digitalization	Raise awareness among the team about the value of CRM in commercial management	Presentation (PowerPoint / Canva)	Theoretical presentation
Navigation in Zoho CRM	Interface, Main Menu, Modules (Customers, Contacts, Opportunities)	Familiarize the user with the platform environment	Zoho CRM	Step-by-step guide
Customer Management	Creating, editing, and updating customer records	Ensure the correct recording and maintenance of information	Zoho CRM	Practical tutorial
Opportunity Management	Opportunity registration, pipeline registration, commercial follow-up	Standardize the sales process	Zoho CRM	Case Study
Using dashboards and reports	Interpretation of KPIs, monitoring of indicators	Promote data-driven decision-making	Zoho CRM	Visual Guide
Task automation	Automatic reminders, alerts and flows	Optimize commercial follow-up times	Zoho CRM	Practical workshop
Best practices in the use of CRM	Data quality, constant updating, responsible use	Ensuring the sustainability of the system	PDF Document	Manual of good practices
Frequently Asked Questions (FAQs)	Solution to common doubts of the sales team	Facilitate the adoption of the system	PDF Document	Quick Reference Guide