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A REVIEW OF THE ISSUES ASSOCIATED WITH CUSTOMER RELATIONSHIP MANAGEMENT SYSTEMS

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ABSTRACT

Customer Relationship Management (CRM) standard package software has become a key contributor to attempts at aligning business and IT strategies in recent years. The past decade has witnessed a shift from the need to manage transactions to that of the need to manage relationships. Where Enterprise Resource Planning software dominated the management of transactions era, CRM software leads in regard to relationships. At present, a balanced view of CRM software is scantly presented instead relying on vendor rhetoric. This paper aims to make a contribution to this neglected area by presenting an analysis of some of the key issues associated with CRM systems. Three issues emerge: the limitations of CRM standard software, the need for a holistic view of CRM projects and the problems of a dominant management perspective of CRM projects. It is argued that these issues could be more readily accommodated by organisational detachment from beliefs in IT as utopia, consideration of prior IS theory and practice and a more informed approach to CRM software selection. The paper also raises research questions in relation to CRM systems, IT maturity, standard software trends and the role of the IS function.

1. INTRODUCTION

Information Technology (IT) is constantly implemented by organisations to help improve competitiveness although it seems that as new IT based systems and concepts become available, they are devoured by organisations with little thought for existing and past practice. Many managers still appear to subscribe to the technological utopianism that Kling (1996) refers to as the use of technologies to shape a vision where life is 'enchanting and liberating'. Markus and Benjamin (1997) discuss the problem of this belief using the magic bullet theory of IT and organisational change - when IT is used, desirable organisational change will result. Projects such as the widely cited French Railways Socrate system highlight this idea (Mitev 1998). The Socrate system was supposed to bring about a new philosophy of selling but was initially rejected by staff and customers as too much emphasis was placed upon success in relation to the technology. The past ten years of IT implementation include several instances where organisations have leaped before they looked. Clear inclusions here are Business Process Reengineering (BPR) (Hammer 1990) and Enterprise Resource Planning (ERP) systems (Holland and Light 1999, Davenport 1998). More recently, dot com's set up on the premise that 'if we make it, [a web site], customers will buy it, [our product or service']. Recent failures such as Clickmango reinforce the problems with this thinking. It seems as though organisations suffer from

Alzheimer's and need reminding that magic bullets do not exist. Lyytinen and Robey (1999) discuss this problem from a systems development perspective. They state that organisations fail to learn from their own experiences and that of others. It can be argued that Customer Relationship Management (CRM) systems are one of the latest cases. At present, a balanced view of CRM software is scantly presented and relies mostly on vendor rhetoric and managerially focussed practitioner reports. Few un-sanitised reports emerge that allow for the learning that Lyytinen and Robey indicate is required. Works on CRM in the financial services industry (Peppard 2000) and at IBM (Ciborra and Failla 2000) are notable exceptions. This paper offers a contribution to this neglected area by presenting an analysis of CRM systems. The paper provides insights into the context, rationale and consequences of CRM system implementation. It is important to acknowledge at this point that CRM systems have the potential to offer immense value to organisations. The aim is to highlight the potential problems of CRM systems in order that managers can enter into projects more informed and therefore hopefully improve the process of selection, implementation and usage.

The next section defines CRM and offers a short discussion of the context and rationale for CRM system implementation. The research method is described next and extracts from the data collected follow. This data is used to highlight a range of issues associated with CRM systems. Finally, some thoughts on the implications of the findings and recommendations for future research are provided.

2. CUSTOMER RELATIONSHIP MANAGEMENT

CRM has become one of 'the' buzzwords for many organisations. Ody (2000) offers three views of the concept of CRM. The first is concerned with precision marketing - the exact matching of a product or service with a customer's requirement in order to secure sales. The second relates to the notion of creating a single, coherent view of customers as commonly associated with call centres. The third is focused on consumer databases with CRM driving investment into data warehouses. Ovum (1999) state that CRM is a business theory built around the simple premise that it pays to know about and look after customers. Generally, definitions hint that CRM is fundamentally concerned with, the idea that:

"A tiny proportion of a company's customers will generate the bulk of its profits. Identifying, collecting and keeping these clients is the very essence of customer relationship management"

(Clemons 2000, 25)

It is impossible to ignore the striking similarities between CRM and relationship marketing. Relationship marketing is based on the idea that the happier a customer is with a relationship, then the greater the likelihood they will stay with an organisation. There is also strong evidence that customer retention and profitability are correlated (Payne et. al. 1999). Berry (1983) states that relationship marketing is about attracting, maintaining and enhancing customer relationships. Gronroos (1991) and also offers insights in the same vein. CRM software can therefore be seen as being useful for the assisting in the operationalisation of relationship marketing concepts – *it is not CRM*. However, many standard package based CRM systems do not offer integration with back office functions to fully support a relationship management strategy. This is an important point and will be discussed again later in the paper.

The rise of CRM software can be linked to two decades of globalisation and the requirement for an appropriate strategic response. During this time, many organisations identified that IT and organisational infrastructures were incompatible with a globalisation strategy. The chronology of the situation was often that IT infrastructures developed on a functional silo basis, nationally and internationally. Therefore, management attention focused on maximising operational efficiency and effectiveness and was a key reason for the domination by ERP systems (Markus and Tanis 2000). The focus on improving transactional effectiveness and efficiency ignored a critically important issue. Organisations were aware that as globalisation occurred, levels of international competition, and subsequently the threat of new entrants, and new opportunities, increased (Tersine and Harvey 1998). What seemed to be neglected was that trying to compete for new customers was more resource intensive than keeping existing ones. Even the organisations that recognised this believed that improvements in operational efficiency and effectiveness would keep customers happy, despite the concept of relationship marketing gaining widespread acceptance. It was not

until throughout the 1990s that the need to manage relationships was embraced. Perhaps this may be linked with the growth of CRM software, rather than the concept of relationship marketing or CRM per se. It is possible to argue that managers saw CRM systems as another silver bullet. Certainly the stampede toward the implementation of CRM software, and hitherto the recognition of the need to manage customer relationships is acutely reflected in increase in the size of the market during this time. For example, during 1998-1999 Siebel Systems, the market leader, saw revenue rise by 93 per cent to $790.9m Goodley and Bennett (2000).

3. RESEARCH METHOD

The aim of the study was to investigate the implementation and use of CRM systems. A qualitative case study research strategy was employed as the subject of the study poses content, context and process questions which deal with operational links over time (Pettigrew 1985, Miles and Huberman 1994). The research was descriptive in that the data collected was used to describe events in a given context for the purposes of increasing understanding of the area under investigation (Gummesson 1991). The approach was to compile case vignettes of organisations that were, or had been, involved in CRM system selection, implementation and use. An explicit specification of a-priori constructs was not used, as the author did not have previous knowledge of the area of CRM. However, it is acknowledged that the author used an informal, internalised framework for investigation that was revised throughout the data collection process (which lasted one year). The internalised framework was devised and revised on the basis of previous research activity and the literature review. This took the form of a set of research questions that were used to guide the data collection process. The main research questions were:

> What are CRM systems?
>
> *(Concerned with developing an understanding of the interviewees view of CRM)*
>
> How are they introduced into organisations?
>
> *(Aimed at exploring how CRM systems are selected and implemented)*
>
> What are the implications of CRM system adoption?
>
> *(Examines the multiple effects and perspectives of the implementation of CRM systems)*
>
> What are the differing perspectives of CRM systems?
>
> *(Aims to develop understanding of the consequences of a unitary perspective of CRM system projects)*

The data was collected using a number of techniques including formal and informal interviews with users and managers of CRM projects, review of CRM software whilst operating in organisations and literature such as strategy documents. Table 1 details the interviewees by case.

GoodsCo.	General Manager (CRM) (2), IT Director (1).
EngCo.	CRM Project Manager (5), Finance Director (1).
ProfCo.	Managing Director (5), Marketing Manager (2), Sales Manager (2), IT Manager (5).
ManCo.	Finance Director (2), Marketing Manager (2), IT Manager (2).

Table 1: *Details of interviewees by case*

Interviews usually lasted two to three hours. The number of interviews held varied by organisational member and is indicated in parentheses in Table 1. At least two visits were made to the case organisations with a maximum of five months between each. It is worth noting that there is scope for further theoretical development of the range of issues highlighted by the study. Clearly, some of the issues presented in the

next section will have greater resonance with a broader variety of organisational contexts. The author acknowledges and welcomes this since it reinforces the point of the paper. That is, a range of issues exists and there will be others. In the next section extracts from selected cases are presented. Full cases are not presented however they contain adequate theoretical content to support the arguments made and small cases have been used in the past for the same purpose (Lyytinen and Robey 1999). Pseudonyms are used to protect the autonomy of the organisations.

4. CASE DATA

GoodsCo.

GoodsCo. is a global consumer goods company. It implemented CRM software in its European and American call centres. The rationale was to improve access to customer information and hitherto improve relationship management activity. Historically, each region and country operated their own systems and therefore obtaining management information was an odious task. The company found the CRM software very helpful on the whole, it had a problem resolution database that was widely used and which they felt added value to the customer relationship. However, there were problems in that it was difficult to obtain information about customers. The company sold their products via retailers, in effect their direct customers, and it was very difficult for GoodsCo. to obtain information about whom was purchasing their products. The CRM system was only used to deal with responses to advertisements of products. That is, a free phone number would be printed on billboards etc., and this would be used by consumers to find out where their nearest stockist was. Alternatively, a consumer might see an advertisement and find a stockist without calling the free phone number. In either case limited information about the consumer was available. The only other potential for the development of a relationship was if the consumer decided to register their product with the company or if they called the number when/if they had a problem with the product they had purchased. It was not possible to obtain information about customers via the retailers, as the management information system did not allow for this. GoodsCo. had implemented an ERP system to automate transaction related business processes and the system was configured to deal with bulk orders between GoodsCo. and the retailers. Consequently, GoodsCo. knew for example, that 300 products had gone to a store at Leeds in Northern England, but they did not know where those products went from there. This compounded the difficulty for the company in identifying whom their most profitable customers were.

EngCo.

EngCo. is an internationally dispersed engineering company. CRM software was implemented for the sales force to improve the efficiency and effectiveness. The sales force required significant help as they had been using paper based systems for several years with little information sharing with the rest of the organisation. This meant that they were becoming distracted from their key role of selling and maintaining good relationships by the amount of administration required such as the logging of phone calls, appointments and manual sales analysis. A further management goal was recognition of a strategic problem - that of retaining and managing the sales force and its operations. Many of the sales team had a great deal of invaluable industry related intellectual capital, generally held within their heads. This gave the sales staff a high level of influence and control as the knowledge and skills they held were of great potential value to the company, its customers and very importantly, competitors. The company's management wanted the CRM investment to solve this problem. The IT manager at the company had a good understanding of the concept of CRM and commented on the pitfall of viewing the system as just a sales force automation tool but this was largely ignored by the management team.

ProfCo.

ProfCo. is a national professional services company. The company had an overall CRM strategy to implement and recognised early in their project the limitations of the CRM software they had selected. These were mostly related to the nature of the software. They found the software useful for analysing who their customers were and to some extent the services they were buying. However, the software did not allow them to track the level and progress of the service their customers were buying in order to inform subsequent sales presentations. That is, they knew who was buying from them but they could not properly capitalise on this, as they did not fully know why they kept coming back. The company had been in business for some time and had a 'feel' for why this was the case, but they did expect the CRM system to provide further support in this respect. For example, ProfCo. Needed the system to provide the data to say to customers "every time you use our service, we have a 70 per cent success rate within 3 months and a 98 per cent success rate within 6 months". This problem was further complicated by the company's business model. Agents were used to deliver the service and therefore it was difficult to obtain information about service levels and the progress of the delivery of the service. It was realised that a CRM software package would not provide this and extranet and intranet based systems are currently being developed to allow the organisation and its external partners to contribute to the relationship marketing effort.

ManCo.

ManCo. is a nationally based manufacturing company that exports globally. The director of the company had seen a CRM system in operation in another company and decided that his company should have one too. The company encountered a number of problems as a result. They sold products via agents and the resources and propensity to support remote data entry was scarce. Furthermore, the CRM system would not accommodate the entry of sales order data to maximise the benefits of reporting capability. Tracking incoming sales orders solved the problem of identifying their most profitable customers relatively easily. However, the company could not track agent activity to ensure customers were happy with the service they were receiving. The reporting functionality throughout the system was seen as inadequate by the senior management team and the internal sales team expressed unhappiness when a customer called in, as they could only log one activity at a time. That is, a customer may telephone for a brochure and request an appointment for an agent to call. A member of the sales team therefore had to record two phone calls - one for the brochure and one for the appointment since there was only one field on the screen to enter this data. A cumbersome work around was implemented after a couple of months whereby all permutations of requests were fed into the 'look up' table for the 'reason for call' field. This however, had a striking impact upon the capability of the organisation to automatically automate tasks and activities to improve efficiency and effectiveness. The CRM system was also only implemented in the Sales and Marketing function and it took management some time to realise that the system would not be effective if the rest of the organisation and its external partners were not included in the effort. For example the Sales team found themselves in the position of dealing with a customer as though they were satisfied when they had a problematic relationship with the company due to problems such as inadequate delivery times or faulty goods. It was at this point that it was recognised that the CRM system they had implemented did not support the full range of processes required to support a robust CRM strategy.

5. CASE DISCUSSION AND COMPARISON WITH THE LITERATURE

A number of issues emerge from the case data. A categorisation and discussion of these issues follows with further support for their existence provided from the literature.

Limitations of CRM Standard Software

CRM systems are generally based upon standard software and the reasons for implementation are similar to this class such as increased development speed, reduced development staff requirement and the maintenance of system integrity through pre-coding and subsequent upgrades (PriceWaterhouse 1996). However, it has been shown that standard software has limitations such as problems of flexibility, functionality, cost, control and competitiveness (Light and Holland 2000, Butler 1999, Lucas et. al. 1988). A limitation of CRM software is that it 'assumes' organisations have similar relationship management business processes. However, not all companies have direct contact with their customers for example. GoodsCo., ProfCo. and ManCo. used agents to sell products and services to customers and each experienced difficulty in aligning the software with their business processes. GoodsCo. experienced problems in finding out about the characteristics of their customers. ProfCo. could not monitor the level of service provided to customers and also report the success of the service to existing and potential customers. ManCo., like GoodsCo. experienced problems in discovering the characteristics of customers and also customer services levels as commensurate with ProfCo.'s experience.

A further problem identified by EngCo. and ManCo. relates to the functionality of standard CRM software packages. These organisations chose to implement the same piece of software and experienced similar difficulties. The software could not be configured to hold data about the volume of sales transactions per customer, which is interesting, given that it was presented under the banner of CRM by the vendor. It should be noted however, that this issue only arose within a particular product but it does raise questions regarding the existence of other functionality problems.

The Need for a Holistic View of CRM Projects

CRM systems appear to be built on the ideas of Relationship Marketing but the capabilities of the software are often not congruent with the concept - relationship Marketing must involve the whole organisation (Payne et. al. 1999). Furthermore, the concept of a process orientation gained widespread acceptance throughout the 1990's as a way of improving an organisations customer focus (Hammer 1990). A system aimed at improving customer relationships, but which reinforces functional silos is potentially problematic. The author's experience is that many organisations implement CRM systems in functional silos such as Sales, Marketing and Call Centres. GoodsCo. used a CRM system in their call centre, but clearly required further IT based support for their relationship management activities throughout the rest of the organisation, particularly in relation to gaining feedback from retailers. They used an ERP system to manage their transactions with retailers but it processed bulk orders and this made it impossible to link products with end consumers. EngCo. used the CRM system to improve operational effectiveness, efficiency and codify intellectual capital in the Sales department. A broader view of relationship management was not taken. ProfCo. Implemented the CRM system in the Sales function but quickly recognised that they needed further support to gain information about levels of service provided and the success of the service provided in order to feedback to existing and potential customers. At ManCo. the CRM system was implemented in the Sales and Marketing function and it took the organisation some time to realise that the system would not be effective if the rest of the organisation and its external partners were not included in the effort. Implementing and using CRM systems in a 'localised' manner is likely to provide limited pay off. Organisations will undoubtedly race towards operational effectiveness, what Porter (1996) terms the 'productivity frontier' when they should be looking for strategic fit amongst a range of activities in order to develop a competitive approach to CRM. Industry analysts such as Ovum and Forrester have also highlighted the problems of CRM systems in relation to the need for a holistic view of the customer. They argue that CRM system need to offer back office integration capabilities and also incorporate the availability of links with a variety of channels such as phone, web and mail (Phillips 2000). Peppard (2000) reinforces this point stating that, in a financial services context, many institutions have taken a narrow view of CRM, as illustrated above. He further concurs with the author’s findings and argues that enterprise-CRM, which embraces the total organisation is scarce.

The Problems of a Dominant Management Perspective of CRM Projects

CRM is often seen from a management perspective that assumes a unitary view of organisations. As stated earlier, to date, little academic work has focussed on CRM systems with much of the published work in business papers, magazines and on web sites. This is a valuable source of data, however it can be sanitised, usually presenting the perspective of management in organisations. This can be problematic and is highly likely to miss or ignore other important views and subsequent issues, strategic or otherwise. It also assumes that those in management positions in organisations subscribe to the unitary view when in fact they are individuals with a range of interests in the same way that other non-managerial organisational members are. For example, Van Bennekom and Blaisdell (2000) present the key lessons from a CRM implementation such as:

- Define your [*management*] needs;
- Compose a project team of users [*so that they think it's their idea*];
- Be prepared for mutual adaptation and leverage this opportunity [*use the system to drive change*];
- Decide the role of the new CRM system [*will it informate or automate*].

At GoodsCo. EngCo., ProfCo. And ManCo. the agenda for implementation was very managerially focussed and was consistent with the industry rhetoric. The aim was to improve efficiency, effectiveness, competitiveness, and also to codify intellectual capital. In the case of EngCo. and ManCo. the original spark for the implementation was that the Managing Directors had seen a CRM system in operation in another company and decided that they 'wanted' one. Each company implemented the same software that they had seen in operation - the rationale being that if product 'X' worked for that company, then it would work for theirs.

Organisation	Limitations of CRM Standard Software	The Need for a Holistic View of CRM Projects	The Problems of a Management Perspective of CRM Projects
GoodsCo.	• Misfit between business processes and software.	• Implemented in Call Centre.	• Improve operational efficiency and effectiveness. • Codify intellectual capital (evidence marginally implied)
EngCo.	• Software could not be configured to hold data about the volume of sales transactions per customer.	• Implemented in Sales department.	• Improve operational efficiency and effectiveness. • Codify intellectual capital (evidence explicit) • Managing Director saw CRM software in operation elsewhere and wanted it.
ProfCo.	• Misfit between business processes and software.	• Implemented in Sales and Marketing department.	• Improve operational efficiency and effectiveness. • Codify intellectual capital (evidence implied)
ManCo.	• Misfit between business processes and software. • Software could not be configured to hold data about the volume of sales transactions per customer.	• Implemented in Sales and Marketing department.	• Improve operational efficiency and effectiveness. • Codify intellectual capital (evidence implied) • Managing Director saw CRM software in operation elsewhere and wanted it.

Table 2: *Summary of issues emerging from the case data*

The use of CRM software to codify intellectual capital was also a strong driver for implementation in order to reduce the power base of sales executives, particularly at Eng.Co. At ProfCo. ManCo. this was an implied issue, and to a lesser extent the same can be said of GoodsCo. The problem, to varying degrees, for each of the cases was that those who interacted directly with customers had built up a substantial amount of

knowledge valuable to their existing employer and its competitors. Even though there were intellectual property terms written into contracts, it was impossible to make an somebody leave behind what they knew, and not pass this on to their next employer, if they ever left the organisation. The codification of data about customer relationships into a CRM system was viewed as making provision for if an employee left. In relation to the cases, initially management's agenda prevailed with the underpinning assumption of a unitary view of organisations. Several of the case organisations, having failed to implement the CRM system with this underlying philosophy, are attempting to recognise and accommodate competing interests in order to operationalise the system more successfully. This point is reinforced by the case described by Van Bennekom and Blaisdell (2000) where management forced a CRM 'tool' onto the sales force and where the sales force realised the new system increased management ability to watch and control - few used the tool. Ciborra and Failla (2000) add further weight to the need to consider this issue in their analysis of IBM's CRM project. They suggest that the installed base (for example the sales force as above) may influence the implementation of CRM.

Table 2 summarises the issues arising in each of the case organisations and suggests that there appear to be a range of issues that arise on a recurrent basis although these are highly likely to be influenced by their context.

6. CONCLUSIONS

The organisations in the study pin organisational success upon IT based systems to varying degrees. The paper offers insights into the rationale for this (and in some cases lack of it). Arguments can be made that organisations are 'sold' the idea of success by vendors although the cases show how organisations may also sell themselves the idea via self-induced peer pressure. That is, by wanting what competitors or other organisations have. Confusion about the definition of CRM is also a likely contributor to the problems encountered by organisations. Organisations need to understand the theoretical and practical implications of the business perspective of CRM before embarking upon a CRM system project. CRM systems must be viewed as, potentially, a key component of the operationalisation of a CRM strategy – not the only component. These issues contribute to inadequate, at best and ill informed, at worst selection processes - a critical vehicle for understanding the resultant problems associated with implementation and usage.

To be successful, CRM projects need to be viewed as more than the implementation of IT. However, IT considerations should not be ignored. For example, systems integration capabilities and requirements are an important issue - particularly if a holistic relationship marketing strategy is to be adopted. Furthermore, the findings in relation to the limitations of CRM standard software acutely reflect the lack of learning about the idea of IT Utopia. Even though problematic ERP projects are now emerging, transferable learning appears to be neglected. The misfit between business processes and software is a key example. Finally, the dominant management perspectives of the CRM projects at the case organisations suggest relatively low levels of maturity with regard to IT. Operational efficiency is mistaken for competitiveness and the competing interests of different groups is not recognised or neglected.

Further work would therefore be useful which examines such areas as success and failure in CRM system projects, case studies of organisations that have implemented holistic CRM system strategies and the impact of CRM systems upon organisational cultural microcosms. The work also raises interesting research questions for the field of information systems in general. Do differences in organisational maturity and perspective of IT impact upon selection, implementation and use? What are the consequences of trends toward standard software, and application service provision models? What happens to the role of the IS function in these scenarios and how will this impact organisational IT selection, implementation and usage capability?

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