Customer relationship management research (1992-2002): An academic literature review and class

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Customer relationship management research (1992-2002)

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An academic literature review and classification

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Abstract

Purpose – To review the academic literature on customer relationship management (CRM), provide a comprehensive bibliography and propose a method of classifying that literature.

Design/methodology/approach — A range of online databases were searched to provide a comprehensive listing of journal articles on CRM. Six hundred articles were identified and reviewed for their direct relevance to CRM. Two hundred and five articles were subsequently selected. Each of these articles was further reviewed and classified. The review and classification process was independently verified. All papers were allocated to the main and sub-categories based on the major focus of each paper.

Findings – Papers and research on CRM falls into five broad categories (CRM – General, Marketing, Sales, Service and Support, and IT and IS) and a further 34 sub-categories. The most popular areas covered by the papers lay in the sub-category of CRM management, planning and strategy; and CRM general, concept, and study followed by papers in software, tools and systems; data mining, knowledge management, and e-commerce.

Originality/value – This is the first identifiable academic literature review of CRM research. The bibliography provides an academic database of the literature between 1992 and 2002 covering 89 journals. The classification approach provides a means to conceptualise the coverage of CRM and the relative popularity of CRM topic areas.

Keywords Customer relations, Relationship marketing, Research work, Classification

Paper type Literature review

Introduction

Interest in customer relationship management (CRM) began to grow in 1990s (Ling and Yen, 2001; Xu et al., 2002). Regardless of the size of an organization, businesses are still motivated to adopt CRM to create and manage the relationships with their customers more effectively. An enhanced relationship with one's customers can ultimately lead to greater customer loyalty and retention and, also, profitability. In addition, the rapid growth of the internet and its associated technologies has greatly increased the opportunities for marketing and has transformed the way relationships between companies and their customers are managed (Bauer et al., 2002).

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Although CRM has become widely recognized as an important business approach, there is no universally accepted definition of CRM. Swift (2001, p. 12) defined CRM as an "enterprise approach to understanding and influencing customer behaviour through meaningful communications in order to improve customer acquisition, customer retention, customer loyalty, and customer profitability". Kincaid (2003, p. 41) viewed CRM as "the strategic use of information, processes, technology, and people to manage the customer's relationship with your company (Marketing, Sales, Services, and Support) across the whole customer life cycle". Parvatiyar and Sheth (2001, p. 5) defined CRM as "a comprehensive strategy and process of acquiring, retaining, and partnering with selective customers to create superior value for the company and the customer. It involves the integration of marketing, sales, customer service, and the supply-chain functions of the organization to achieve greater efficiencies and effectiveness in delivering customer value". These definitions emphasize the importance of viewing CRM as a comprehensive set of strategies for managing those relationships with customers that relate to the overall process of marketing, sales, service, and support within the organization. Moreover, information technology (IT) and information systems (IS) can be used to support and integrate the CRM process to satisfy the needs of the customer.

CRM is an attractive area for research because of its relative novelty and exploding growth. This paper presents a comprehensive review of CRM research conducted between 1992 and 2002 and published in academic journals, and a classification of this research. It is recognised that practitioner publications and reports also contain a great deal of material on CRM, but these were not selected for inclusion in this study which specifically focused on academic publication. The remainder of the paper is organized as follows: first, the research methodology used in the study is described; second, the method for classifying CRM articles is presented; third, the CRM articles are analysed and the results of the classification are reported; and finally, the conclusions and implications of the study are discussed.

Research methodology

As the nature of research on CRM is difficult to confine to specific disciplines, the relevant materials are scattered across various journals. Marketing, Business and Management, and IT and IS are some common academic disciplines for CRM research (Parvatiyar and Sheth, 2001; Rajola, 2003). Consequently, the following online journal databases were searched to provide a comprehensive bibliography of the academic literature on CRM:

- · ABI/INFORM database:
- Academic Search Premier;
- · Business Source Premier;
- · Emerald Fulltext;
- · Ingenta Journals; and
- · Science Direct.

The literature search was based on the descriptor, "customer relationship management", which originally produced approximately 600 articles. The full text of

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each article was reviewed to eliminate those that were not actually related to CRM. The selection criteria were as follows.

- Only those articles that had been published in Marketing, Business and Management, and IT and IS journals were selected, as these were the most appropriate outlets for CRM research and the focus of this review.
- Conference papers, masters and doctoral dissertations, textbooks and unpublished working papers were excluded, as academics and practitioners alike most often use journals to acquire information and disseminate new findings. Thus, journals represent the highest level of research (Nord and Nord, 1995).

The search yielded 205 CRM articles from 89 journals. Each article was carefully reviewed and separately classified in five different categories, as shown in Figure 1. Although this search was not exhaustive, it serves as a comprehensive base for an understanding of CRM research.

Classification method

According to Kincaid (2003), West (2001) and ${\rm Xu}\ et\ al$ (2002), CRM comprises three major functional areas:

- (1) Marketing;
- (2) Sales; and
- (3) Services and Support.

These three components may be seen as the life cycle of a customer relationship that moves from marketing, to sales, to service and support (West, 2001). Indeed, IT and IS are the other crucial components in supporting and maintaining these three functional areas as well as the whole CRM process (Kincaid, 2003). Thus, the classification framework proposed and shown in Figure 1 is based on these four areas (Marketing,

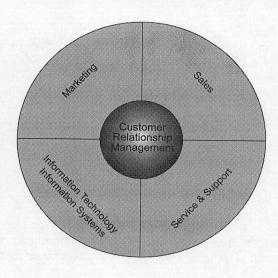


Figure 1. Classification framework for CRM articles

Sales, Services and Support, and IT and IS), plus a fifth covering CRM as a general category as explained below:

- (1) *CRM*. This is the core part of the classification framework that includes general discussion, concept, and managerial aspects of CRM.
- (2) Marketing. Marketing is the function most often associated with CRM (Kincaid, 2003). CRM is founded in marketing (Russell-Jones, 2002) and relationship marketing (Ryals and Knox, 2001). Ling and Yen (2001) have described the evolution of CRM from direct sales to mass marketing, target marketing, and then to customer relationship marketing thus emphasising that marketing and CRM are inseparable.
- (3) Sales. The sales function is direct interaction with customers, which makes up CRM (Kincaid, 2003). It is important to develop sales strategies at the customer level to build and maintain relationships with customers to achieve revenue goals (Ingram *et al.*, 2002). With technologies emerging for the sales function, it is possible to make the sales process more efficient and automated to increase sales.
- (4) Service and support. High quality customer service and support is the key to improving customer retention rates and maintaining a good relationship with customers (Yelkur, 2000). In today's highly competitive environment, companies must pay attention to fulfilling the needs of each customer quickly and accurately. Customer satisfaction is hard to win and easy to lose. If customers are not satisfied, they will simply move on to other companies.
- (5) IT and IS. IT and IS play a key role in the development of CRM (Kincaid, 2003; Ling and Yen, 2001). They can be used to automate and enable some or all CRM processes. Appropriate CRM strategies can be adopted through the assistance of technology, which can manage the data required to understand customers. Moreover, the use of IT and IS can enable the collection of the necessary data to determine the economics of customer acquisition, retention, and life-time value. Advanced technology involves the use of databases, data warehouses, and data mining to help organizations increase customer retention rates and their own profitability.

Each of the 205 articles was reviewed and classified into the above five broad categories and further divided into sub-categories based on subject areas that are identified in Table I. This process was undertaken in two stages in which the researcher undertook the initial classification which was further verified by a second independent researcher. The collection of articles was analysed by subject, by year of publication, and by journal.

Classification results

The articles were analysed by year of publication, topic area, and journals.

Distribution by year of publication

The distribution of articles according to their year of publication, from 1992 to 2002, is shown in Figure 2. It is clear that the output of research on CRM has increased

Customer relationship management

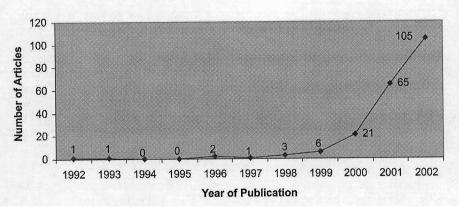
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Subject headings	Number of articles	Percentage by subject	Percentage of all subjects
CRM			
Management, planning, and strategy	35	53.8	17.1
General, concept, and study	21	32.3	10.2
Performance management	5	7.7	
Personnel management	4	6.2	2.4 2.0
Total	65	100	31.7
Marketing			
Segmentation, targeting, and positioning	8	22.2	3.9
Customer value	5	13.9	2.4
Pricing and profitability	5	13.9	2.4
Customer retention	4	11.1	2.4
Product	4	11.1	
Consumer behaviour	3		2.0
Trust	3	8.3	1.5
Customer loyalty	2	8.3	1.5
Channel management	1	5.6	1.0
Privacy		2.8	0.5
Total	1	2.8	0.5
	36	100	17.6
Sales			
Account management	6	46.2	2.9
Sales management	3	23.1	1.5
Cross selling/buying	2	15.4	1.0
Sales force automation	2	15.4	1.0
Total	13	100	6.3
Service and support			
Call centre	4	26.7	2.0
Quality management	4	26.7	2.0
Customer satisfaction	3	20.0	1.5
Social and non-profit	2	13.3	1.0
Field service	1	6.7	0.5
Self service	1	6.7	0.5
Total	15	100	7.3
IT and IS	ı		
Software, tools, systems (DSS, ES, IS, ERP, etc.)	17	22.4	8.3
Data mining	15	19.7	7.3
Knowledge management	12	15.8	5.9
E-commerce	10	13.2	4.9
E-CRM	7	9.2	3.4
Data, information, and technology management	5	6.6	
Internet	4	5.3	2.4
Data warehouse	2	2.6	2.0
Optimization	$\overset{2}{2}$		1.0
Personalization	$\overset{2}{2}$	2.6	1.0
Total	76	2.6	1.0
· · · · · · · · · · · · · · · · · · ·	10	100	37.1

Table I.Distribution of CRM articles by subjects headings



Customer relationship management

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Figure 2. Distribution of articles by year

significantly since 1999. A total of 191 publications were found for last three years of the study (2000-2002), representing 93 per cent of the total.

Distributions of articles by subject

The distribution of articles by subject is shown in Figure 3. The majority of the articles (76 out of 205 or 37.1 per cent of the total) were related to IT and IS in CRM, while the category of sales saw the fewest published articles (13 or 6.3 per cent of the total). Table I shows the distribution of articles in each CRM subject. The category of CRM includes four sub-categories. The bulk of such articles (35 articles or 17.1 per cent of the total) were related to "management, planning, and strategy". These were followed by those concerning "general, concept, and study" (21 articles, 10.2 per cent of the total), "performance management" (5 articles, 2.4 per cent of the total) and "personnel management" (4 articles, 2.0 per cent of the total) in CRM. Of the 36 articles on marketing in CRM, 22.2 per cent were associated with "segmentation, targeting, and positioning", followed by 13.9 per cent on "customer retention" (five articles) and "customer value" (five articles). There were relatively few articles falling under the categories of sales and service and support associated with CRM. The category of sales contains four sub-areas. Six articles were on "account management", while three articles were related to "sales management". Of the 15 articles on service and support,

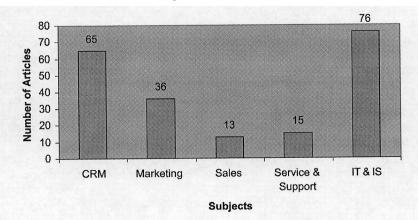


Figure 3. Distribution of articles by subject

four articles were related to "call centre" and "quality management", respectively. There were 76 articles on IT and IS associated with CRM, and 17 on "software, tools, systems (decision support system (DSS), expert system (ES), IS, enterprise resource planning (ERP), etc.)". These were followed by studies on "data mining" (15 articles) and "knowledge management" (12 articles). As indicated in Table I, the three largest subject areas were "management, planning, and strategy" (17.1 per cent), "general, concept, and study" (10.2 per cent), and "software, tools, systems (DSS, ES, IS, ERP, etc.)" (8.3 per cent). Table II summarizes all of the reviewed articles that correspond to the subject headings. This is a helpful resource for anyone searching for CRM papers in a specific area.

Distribution of articles by journal

Table III shows the distribution of CRM articles by journal. Only two journals have more than ten articles related to CRM research. They were the *Journal of Database Marketing* (21 articles) and *Interactive Marketing* (14 articles). The *Journal of Database Marketing* is published quarterly and is devoted to shaping the issues and ideas that are associated with customer management including marketing strategy, customer loyalty and experience, call-centre operations, e-business, CRM, data warehousing, and so forth. *Interactive Marketing* has been published quarterly since 1999, and aims to provide the latest interactive marketing concepts, strategies, and applications.

Conclusion and research implications

CRM has attracted the attention of practitioners and academics. Research on CRM has increased significantly over the past few years. This paper identified 205 CRM articles published between 1992 and 2002. Although this review cannot claim to be exhaustive, it does provide reasonable insights and shows the incidence of research on this subject. The results presented in this paper have several important implications:

- There is no doubt that research on CRM will increase significantly in the future based on past publication rates and the increasing interest in this area.
- In our review we found that 76 out of 205 articles were related to IT and IS. IT and IS play an important role in the development and implementation of CRM. The three most popular topics addressed in IT and IS for CRM are "software, tools, systems (DSS, ES, IS, ERP, etc.)", "data mining", and "knowledge management". Such "software, tools, systems (DSS, ES, IS, and ERP, etc.)" can be viewed as technology-based applications to support the CRM process. These application systems should include database capabilities to collect and analyse customer information using statistical techniques such as data mining. Data mining plays a fundamental role in the overall CRM process and is a critical component in the CRM system (Rygielski *et al.*, 2002a). It helps transform customer data into useful information and knowledge. Customer information and knowledge is a company asset that must be managed. A deeper understanding of data mining and knowledge management in CRM is necessary in today's highly customer-centred business environment (Shaw *et al.*, 2001).
- There are relatively fewer articles discussing customer privacy in CRM.
 Companies can capture and analyse customer information through CRM technology. They can use this information for strategic plans involving sales campaigns and other uses. However, customers may not know or may even not

Subject headings	Bibliography	Customer relationship
CRM		
General, concept, and study	Abbott (2001), Abbott et al. (2001a, b), Bose (2002),	management
general, concept, and study	Cox (2000), Daniels (2001), Fletcher (2001), Hart et al.	
	(2002), Kelly (2000), Leventhal (2000), McKim (2002),	
	Nairn (2002), Narayanan and Brem (2002), Paas and	589
	Kuijlen (2001), Parvatiyar and Sheth (2001), Peppard	the autographic of a star success of appear
	(2000), Plakoyiannaki and Tzokas (2002), Rigby et al. (2002), Verhoef and Langerak (2002), West (2001) and	
	Xu et al. (2002)	
Management, planning, and strategy	Almquist et al. (2002), Beckett-Camarata et al. (1998),	
vianagement, planning, and strategy	Brotherton (2000), Carmichael (1997), Chang et al.	
	(2002), Crosby (2002), Donbavand (2002), Dowling	
	(2002), Doyle and Georghiou (2001), Hansotia (2002),	
	Hirschowitz (2001), Jain et al. (2002), Kanter (1992),	
	Kendrick and Fletcher (2002), Kracklauer et al. (2001),	
	Ling and Yen (2001), McKim and Hughes (2001),	
	O'Halloran and Wagner (2001), O'Malley (2000), O'Malley and Mitussis (2002), Palmer and Brookes	
	(2002), Peppers <i>et al.</i> (1999), Pompa <i>et al.</i> (2000),	
	Ryals and Knox (2001), Ryals and Payne (2001),	
	Sawhney (2002), Seybold (2001), Slywotzky and	
	Shapiro (1993), Stone et al. (1996), Sutherland (2002),	
	Wilson et al. (2002), Winer (2001), Woodcock	
	and Starkey (2001), Wright et al. (2002) and	
	Yu (2001)	
Performance management	Shaw (1999), Sheth and Sisodia (2001), Starkey and Woodcock (2002), Starkey et al. (2002) and Woodcock	
	(2000)	
Personnel management	Baker (2002), Galbreath and Rogers (1999), Helfert	
1 Crsonner management	and Vith (1999) and Jauhari (2001)	
Marketing		
Channel management	Rheault and Sheridan (2002)	
Consumer behaviour	Moe and Fader (2001), Ojasalo (2001) and Watkins	
	and Liu (1996) Coner and Gungor (2002) and Reinartz and Kumar	
Customer loyalty	(2002)	
Customer retention	Aspinall et al. (2001), Chattopadhyay (2001), Lemon	
Customer retention	et al. (2002) and Ultsch (2002)	
Customer value	Calciu and Salerno (2002), LiBrizzi (2001), Panda	
	(2002), Srivastava et al. (1999) and Verhoef and	
	Donkers (2001)	
Pricing and profitability	Anderson (2002), Hopkinson and Lum (2002), Hutt (2000), Koslowsky (2001) and Ryals (2002)	
Duivoov	Cannon (2002)	
Privacy Product	Forza and Salvador (2002), Ryder (2000),	
Troduct	Tollin (2002) and Wind (2001)	
Segmentation, targeting, and positioning	Dibb (2001a, b), Dorrington and Goodwin (2002),	
1	Giltner and Ciolli (2000), Hansotia and Rukstales	
	(2002), Hymas (2001), Lerer (2002b) and	
	Soper (2002)	Table I
Trust	Bayon et al. (2002), Kimery and McCord (2002) and	Classification of reviewe
	Schoenbachler and Gordon (2002) (continued)	literatu

MIP	Subject headings	Bibliography
23,6	Sales	
	Account management	Arnold <i>et al.</i> (2001), Birkinshaw <i>et al.</i> (2001), McNat (2002), Ojasalo (2002), Wong (1998) and Woodburn (2002)
-00	Cross selling/buying	Jarrar and Neely (2002) and Verhoef et al. (2001)
590	Sales force automation Sales management	Speier and Venkatesh (2002) and Widmier <i>et al.</i> (2002) Dorsch <i>et al.</i> (2001), Ingram <i>et al.</i> (2002) and Robinson <i>et al.</i> (2002)
	Service and support	
	Call centre	Feinberg <i>et al.</i> (2002a), Meltzer (2001), Pontes and Kelly (2000) and Seddon (2000)
	Customer satisfaction	Khalifa and Liu (2002), Torcy (2002) and Yelkur (2000)
	Field service	Agnihothri et al. (2002)
	Quality management	Jonson (1999), Li et al. (2002a, b) and Sinha (2001)
	Self service	Bitner et al. (2002)
	Social and non-profit IT and IS	Buttle and Boldrini (2001) and Pang and Norris (2002)
		Foss et al. (2002), Groves (2002), Jukic et al. (2002a, b and Karimi et al. (2001)
	Data mining	Baker and Baker (1998), Danna and Gandy (2002), Drew <i>et al.</i> (2001), Furness (2001), Ha <i>et al.</i> (2002), Hassanein (2002), Koh and Chan (2002), Lejeune (2001), Mena and Pettit (2001), Min <i>et al.</i> (2002), Nemati and Barko (2002), Nitsche (2002b), Rygielski
	Data warehouse	et al. (2002a, b) and Yuan and Chen (2002) Cooper et al. (2000) and Robinson and Chappelear (2002)
	E-Commerce	Bapna et al. (2001), Bhattacherjee (2001), Bradshaw and Brash (2001), Ferguson (2000), Jarach (2002), Kapoulas et al. (2002), Lerer (2002a), Nielsen (2002), Romano (2002) and Tan et al. (2002)
	E-CRM	Feinberg and Kadam (2002), Fairhurst (2001), Feinberg and Kadam (2002), Feinberg et al. (2002b), Kotorov (2002), Romano and Fjermestad (2001) and Taylor and Hunter (2002)
	Internet	Bauer <i>et al.</i> (2002), Courtheoux (2000), McGowan <i>et al.</i> (2001) and Olsen <i>et al.</i> (2001)
	Knowledge management	Blosch (2000), Fahey <i>et al.</i> (2001), Gamble <i>et al.</i> (2001), Garcia-Murillo and Annabi (2002), Gibbert <i>et al.</i> (2002), Massey <i>et al.</i> (2001), Morik <i>et al.</i> (2002), Raeside and Walker (2001), Roscoe (2001), Rowley
	Optimization	(2002a, b) and Shaw <i>et al.</i> (2001) Doyle (2002a, b)
	Personalization	Fink and Kobsa (2000) and Fink <i>et al.</i> (2002)
	Software, tools, systems (DSS, ES, IS, ERP, etc.)	Barlow (2001), Chen et al. (2002), Choy et al. (2002), Corner and Hinton (2002), Crosby and Johnson (2001), Fano and Gershman (2002), Gefen and Ridings (2002), Hamm and Hof (2000), Kohli et al. (2001), Mirani et al. (2001), Nitsche (2002a), Rao (2000), Shoemaker (2001),
able II.		Silverman et al. (2001), Stamoulis et al. (2002), Wells and Hess (2002) and Yuan and Chang (2001)

	1999 2000 2001										1							1				•	1	
	Year 1997 1998						1					<u>-</u>												
	1996																							
	1992 1993																							
ble III.	Count by Journal Journal	International Journal of Nonprofit and Voluntary Sertor Marketins	International Journal of Retail & Distribution	Management International Journal of Service Industry	Management	International Journal of Services Technology and Management	International Marketing Review	Internet Kesearch Iournal of Air Transhort Management	Journal of American Academy of Business,	Cambridge	Iournal of Brand Management	lournal of Business Ethacs Tournal of Business Research	Tournal of Business Strategy	Sournal of Computer Information Systems	iournal of Database Marketino	Journal of Economic & Social Research	Iournal of European Industrial Training	Iournal of Financial Services Marketing	Journal of Information Technology Cases and	Applications T.	Iournal of Information Lechnology Theory and Application	Topposition of Interactive Marketing	Journal of International Business Studies	

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Grand total 2002 105 2001 65 2000 12 1999 0 9 Year 1998 3 1997 1996 2 1993 1992 Supply Chain Management: An International Journal The Journal of Government Financial Management The Journal of Management Development User Modeling and User-Adapted Interaction Technology in Society The Journal of Bank Cost & Management Sloan Management Review Total Quality Management Supply Chain Practice The TQM Magazine Strategic Direction Count by Journal Accounting

Table III.

relationship

management

be willing to have their information captured. Companies cannot ignore customer privacy because respecting privacy helps to build trust (Cannon, 2002; Schoenbachler and Gordon, 2002). More research in this area should be considered.

 It was not surprising to find that a large portion of the reviewed articles were related to "General, concept, and study" and "Management, planning, and strategy" for CRM because CRM is still a new phenomenon for many businesses. Most of these articles conceptually described CRM in a general way. In fact, CRM researchers can try to study more specific CRM functions including marketing, sales, and services and support.

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