

CRM Packaged Software: A Study of Organisational Experiences

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Abstract

Customer Relationship Management (CRM) packaged software has become a key contributor to attempts at aligning business and IT strategies in recent years. Throughout the 1990s there was, in many organisations strategies, a shift from the need to manage transactions and toward relationship management. Where Enterprise Resource Planning packages dominated the management of transactions era, CRM packages lead in regard to relationships. At present, balanced views of CRM packages are scantily presented instead relying on vendor rhetoric. This paper uses case study research to analyse some of the issues associated with CRM packages. These issues include the limitations of CRM packages, the need for a relationship orientation and the problems of a dominant management perspective of CRM. It is suggested 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 package selection.

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 experiences. Many managers still subscribe to the technological utopianism that Kling (1996) refers to as the use of technologies to shape a vision where life is 'enchanted 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 1990s, and early in the 2000s, include several instances where organisations have leaped before they looked. Clear inclusions here are Business Process Reengineering (BPR) (Hammer 1990), Enterprise Resource Planning (ERP) systems (Holland and Light 1999, Davenport 1998) and the dot com arena (Howcroft 2001). It seems as though organisations 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. Customer Relationship Management (CRM) packages are one of the latest cases. Balanced views of CRM packages are scantily presented and rely 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. Consequently, this paper provides insights into the context, rationale and consequences of CRM package implementation. It is important to acknowledge at this point that CRM packages have the potential to offer immense value to organisations. Indeed, package software may be the only economically viable alternative for small and large organisations. The aim of the paper is to develop a better understanding of the potential problems associated with CRM packages in order that people in organisations 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 package 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 packages. Finally, some thoughts on the implications of the findings and recommendations for future research are provided.

The Concept and Confusion of CRM

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. 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 related (Payne et. al. 1999). Gronroos (1991) states that relationship marketing is about attracting, maintaining and enhancing customer relationships. CRM packages should therefore be seen as being useful for the assisting in the operationalisation of relationship marketing concepts. To elaborate, the organisational experiences reported in this paper, combined with the various definitions of CRM, highlight CRM as much more than a packaged software and implementation activity.

The rise of CRM packages 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 packages, rather than the concept of relationship marketing or CRM per se. It is possible to argue that managers saw CRM packages as another silver bullet. Certainly the stampede toward the implementation of CRM packages, 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).

Research Method

The aim of the study was to investigate organisational experiences of CRM packaged software. 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 package evaluation, 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 created/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. At GoodsCo, the General Manager for CRM (2) and IT Director (1) were interviewed. At EngCo, the CRM Project Manager (5), Finance Director (1), Sales Director (1), Tendering Manager (1) IT Consultant (1) and Managing Director (1) were interviewed. At ProfCo, Managing Director (5), Marketing Manager (2), Sales Manager (2) and IT Manager (5) were interviewed. Interviews usually lasted two to three hours and the number of interviews held varied by organisational member and is indicated in parentheses after each organisational member listed above. At least two visits were made to the case organisations with a maximum

of five months between each. Review of the CRM packages whilst operating in organisations and documentary evidence such as strategy and requirements documents was also considered. It is worth noting that there is scope for further 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 dependent very much upon content, context and process issues. In the next section extracts from selected cases are presented. Full cases are not presented however, they contain adequate content to highlight issues for discussion 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.

Case Data

GoodsCo

GoodsCo is a global consumer goods company. Historically, each region and country operated their own systems based on a variety of simple user-developed applications. As each country operated autonomously, there was not a conscious effort to capture fundamental information such as product registrations. If a pan-regional view of the customer base was required then circa 11 phone calls had to be made. In 1998, it implemented a CRM package in its American call centres customer facing activities including sales, marketing and service. The package was considered one of the market leaders at the time for large organisations. In 1999, a different package was implemented to support the European call centres. Since this supported pre and post sales activities, and the 'American' package only supported post sales, the decision was taken to move the whole organisation to the package chosen to support European operations. Up to this point, the American operations had been using what they described as a 'home grown' system to support pre-sales activities. The packages were used by a variety of groups in both regions. These included 60 call centre operatives, 6 call centre supervisors, three Managers (of Marketing origin) and 4 product development specialists.

The package was viewed as very helpful on the whole, it had a problem resolution database that was widely used and which they felt added value to the consumer relationship. However, the company sold their products via retailers, who were in effect their direct customers, and it was very difficult for GoodsCo to obtain data about whom was purchasing their products (their consumers). The CRM package was really only used to support marketing and service activity as much of the selling process was conducted by the retailers.

Essentially, GoodsCo would market and advertise their products and provide a free phone number on the advertisement. The consumer might then contact the call centre to locate the nearest stockist of the product. Alternatively, a consumer might see an advertisement for a product and find a stockist without calling the free phone number. Even if the consumer used the free phone number, they would only know that an enquiry had been made by a particular consumer about a particular product and that they had been directed to a retailer based upon their post-code. The only other potential for the development of a relationship was if the consumer bought a GoodsCo product and decided to register it with the company or if they called the number with a problem with the product they had purchased or a service enquiry. It was not possible to obtain information about customers via the retailers, as the information system which, supported business-to-business relationships did not allow for this. GoodsCo had implemented an ERP package to automate transaction related business processes and it was configured to deal with bulk orders between GoodsCo and the retailers. Consequently, GoodsCo knew for example, that 300 units of a particular product had been shipped to a store at Leeds in Northern England and they might also know that they had been sold. However, they did not know where those products went from there even though they might have information in the CRM package that told them they had directed several consumers to that store. This compounded the difficulty for the company in profiling their most profitable consumers and maintaining a relationship with them.

EngCo

EngCo is an internationally dispersed small engineering company. The Managing Director introduced the idea of implementing a CRM package in 1998. The package chosen was a mid-market solution that had evolved from a sales force automation package. The software supported a variety of sales methodologies, but was mainly geared to pre sales and marketing activities such as enquiry capture and response, mail shots, quotation conversion rate analysis and pipeline management. The Managing Director believed he was the most informed about what was available on the market as he viewed himself as one of the most comfortable with IS in the organisation. His rationale for the implementation of the package was that they had lost a large contract, which contributed to 25 per cent of the organisations turnover. His impression was that EngCo had lost the contract as competitors were more creative in the way that they interacted with prospective and existing customers. When pressed on this matter, it became clear that the Managing Director meant the competitors were better at highlighting and focussing upon their most profitable customers. He went on to say that the company needed to get more involved with their customers as they did not fully understand them.

The company had previously implemented an ERP package and this was the dominant system used throughout the company. However, many paper-based systems still existed due to lacking functionality in the ERP package. The company had many customer 'touch points' throughout the internal departments, any of which could become involved with the customer and it was therefore looking to implement a CRM package with the management of this in mind. In particular, 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. A few members of staff developed small standalone applications on their computers but these were not available to the other sales staffs. Sales staffs 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. This gave the sales staff a high level of influence and control as the knowledge and skills they held were of great value to the company, its customers and very importantly, competitors. The Sales Director, although he felt that he knew nothing of CRM, was critical of the existing ways of work, as they did not provide any feedback to him regarding the performance of the internal and external sales force. He could not find out for example, how many calls had been made to customers, where visits were being made – when and by whom, the nature of the company's customer base. He stated that he felt he was always 'operating on a hunch'. The company's management wanted the CRM investment to solve this problem. In contrast, the Tendering Group who would take the requests for quotations and convert them into quotes were not included in the roll out of the package. They felt that the system should have been widened so they could analyse the profiles of prospective customers – that is, whom they historically won business from and whom they didn't. They felt that this knowledge would assist EngCo in being more efficient and effective at quoting for contracts if they could target failures and successes and understand why things were they way they were. However, they were not seen as part of the customer interaction process and merely as Engineers. The IT manager at the company had a good understanding of the concept of CRM and commented on the pitfall of viewing the package as just a sales force automation tool, and not including the Tendering Group, but this was largely ignored by the management team.

ProfCo

ProfCo is a national professional services company with sites at 10 locations in the United Kingdom. The package chosen was the same mid-market solution as EngCo that had evolved from a sales force automation

package. Obviously, as with EngCo, the package therefore supported a variety of sales methodologies, but was mainly geared to pre sales and marketing activities such as enquiry capture and response, mail shots, quotation conversion rate analysis and pipeline management. Several solutions were considered prior to acquisition and a rigorous requirements gathering process was undertaken prior to the various sales presentations of the vendors. However, in 1999 a senior member of the executive group made the decision to purchase the chosen solution based upon a slick presentation (rather than the requirements of ProfCo). The user base for the package was 80. This included geographically dispersed members of The Executive Group, Sales, Marketing and Service Support staff in addition to external ProfCo Agents who facilitated service provision.

The company had devised a CRM strategy that they wished to implement and recognised early in their project the limitations of the package they had selected. This centred on improving customer contact and service provision to increase profitability. To some extent, the sales and Marketing departments 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 the Service Support staffs to track the progress of service provision that customers were buying in order to improve this and to allow data from this to be fed into sales presentations to prospective customers. 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 package to provide further support in this respect. For example, ProfCo wanted the package to provide the data to enable them to report key performance indicators such as "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 as the agents did not want to be monitored. The Executive group denied this was the purpose of the exercise, but secretly were eager to monitor external Agent performance, as there costs were significant. Despite revisiting the other vendor solutions in 1999 and again in 2001 following postponement of the development of a custom based system, it was eventually decided that a piece of packaged software, although the most economical route, was not going to be able to satisfy the business specific demands of ProfCo. Consequently, additional custom systems are now in development that will be integrated with original package that has also been customised.

Case Discussion and Comparison with the Literature

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

Limitations of CRM Packages

The reasons for implementation of CRM packages are very similar to other forms of packaged software which, include drivers 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 suggested that packaged software may have limitations such as problems of flexibility, functionality, cost, control and impacts upon competitiveness (Holland and Light 2001, Butler 1999, Lucas et. al. 1988). A limitation of CRM packaged software is that it tends to embody standardised views of relationship management processes. However, not all companies have direct contact with their customers for example. GoodsCo and ProfCo 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 therefore report on the success of the service to existing and potential customers. EngCo and ProfCo identify a further problem where both organisations chose to implement the same package 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. These findings are not surprising as other studies have highlighted the misfit of packaged software with organisational requirements (Soh et. al. 2001, Nah et. al. 2001). Further work has also examined the implications of this and has attempted to offer insights into organisational experiences in dealing and living with the compromise necessary of adopting a strategy that is for many, more economically viable than custom development (Light 2001).

The Need for a Relationship Orientation

CRM packages 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). The concept of process orientation gained widespread acceptance throughout the 1990s as a way of improving an organisations customer focus (Hammer 1990). A package aimed at improving customer relationships, but which is used to, or implicitly, reinforces functional silos is therefore potentially problematic. In this study, CRM packages were implemented in

functional silos such as Sales, Marketing and Call Centres. GoodsCo used a CRM package 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 package 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 package to improve operational effectiveness, efficiency and codify intellectual capital in the Sales department. A broader view of relationship management was not taken as evidenced by the exclusion of the Tendering Group. ProfCo Implemented the CRM package in the Sales and Marketing functions but quickly recognised that they needed further support to gain information about service provision post sale, in order to feedback to existing and potential customers. Industry analysts such as Ovum and Forrester have also highlighted the problems of CRM packages in relation to the need for a broader view of the customer. They argue that CRM packages 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 much more of the organisation is scarce.

Perhaps then what is required is clearer thinking and terminology in relation to the ideas of relationship management and IT support for its execution. This study highlights how organisations vary in the nature of the relationships they create and maintain. However, current thinking implies a standard approach to relationship management yet CRM is it is generally defined, fundamentally implies return visits or repeat purchases. The nature of a product, service or customer base may be at odds with this. Consider a business-to-business monthly stationery order in contrast to a business-to-consumer contract for a funeral. Even where return visits or repeat purchases occur, people in organisations need to consider the profile of the relationship maker/breaker. It is too simplistic to think of them as the customer. For instance, who is the 'customer' at GoodsCo? Who do they want to maintain the relationship with: the retailer, the consumer or both of them? The term CRM does not make this complexity evident yet it is invaluable to recognise it in CRM package evaluation, selection, and implementation activity. This is also important when different CRM package vendor treatments of the concept may be implicitly embodied in the product they are selling ^[1]. If the case organisations in this study had thought in terms of a 'Relationship Orientation' (that is thinking of their organisations as a framework of dynamic relationships

– as demonstrated by the case data), then maybe their requirements may have been different.

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 packages with much of the published work in business papers, magazines and on web sites. This is a valuable source of data although 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 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 and ProfCo 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 the original spark for the implementation was that the Managing Directors had seen a CRM package in operation in another company and decided that they 'wanted' one. Each company implemented the same package that they had seen in operation - the rationale being that if product 'X' worked for that company, then it would work for theirs. At ProfCo, a savvy sales pitch similarly swayed the Managing Director.

The use of a CRM package to codify intellectual capital was also a strong driver for implementation in order to reduce the power base of particular staff groups, particularly Sales staffs or Agents. 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 someone 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 and its input into a CRM package was viewed as making provision for if an employee left or being able to review contracts based on performance. In relation

to the cases, initially management's agenda prevailed with the underpinning assumption of a unitary view of organisations. However, several of the case organisations, having failed to implement the CRM package with this underlying philosophy, are now 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.

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 organisational perspective of CRM before embarking upon a CRM package implementation. CRM package implementation and usage must be viewed as, potentially but not necessarily, a key component of the operationalisation of a CRM strategy rather than 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. The purpose of this study was not to generalise about the issues related to packaged software in a CRM context, yet some may levy the criticism that the case organisations experiences reported are not representative of the general trend in the macro-environment. In response, it is necessary to point out that the purpose here was to cut through the hyperbole of CRM and present a more comprehensive analysis of organisational experiences that may offer useful learning and a deeper understanding of the issues involved rather than a cookbook approach to CRM. That said, what is interesting to note is that the three organisations involved (one large and two small to medium sized) all implemented there respective market leaders and all experienced some form of difficulty with the package. It is important to note however, that these difficulties were not always solely related to the packaged software itself and rather to the context within which it was residing. Nevertheless, IT considerations should

not be ignored. For example, systems integration capabilities and requirements are an important issue - particularly if a relationship orientation is to be adopted.

The findings in relation to the limitations of CRM packages acutely reflect the lack of learning about the idea of IT Utopia. Even though problematic ERP projects have emerged, knowledge transfer is largely absent. The misfit between business processes and package 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 are not recognised or are neglected. Further work would therefore be useful which examines such areas as success and failure in CRM package implementation, case studies of organisations that have implemented an IT supported relationship orientation and the impact of CRM packages 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 packaged software? What happens to the role of the IS function where packages form the software infrastructure and how might this affect organisational IT selection, implementation and usage capabilities?

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