



2528-9705

Örgütsel Davranış Araştırmaları Dergisi
Journal Of Organizational Behavior Research
Cilt / Vol.: 3, Sayı / Is.: S2, Yıl/Year: 2018, Kod/ID: 81S2272



A REVIEW ON ADOPTION CHALLENGES OF CRM SYSTEM WITHIN ORGANIZATIONS

Hoorie NIKMANESH

MA, Department of IT Management, University of Shahid Behishti, Tehran, Iran.

ABSTRACT

The concept of customer relationship management (CRM) has received a good deal of attention from both academics and practitioners for over 20 years. CRM system has the potential to help improve the business value and competitive capabilities of organization. In this regard CRM may face with vary problem and challenges within organizations. So this study seeks to present the operational adoption issues and challenges facing the organization deploying CRM practices. There are a plethora of challenges facing organizations when adopting CRM. Since a large amount of research has examined the challenges that organizations face during implement CRM. So the purpose of this work is to look at the state of research in CRM research in order to discover challenges. The implementation of CRM systems is not an easy task, and system failure is unfortunately frequent. As a result of our research, we propose a set of strategic CRM system adoption objectives – three fundamental objectives, with a total of eight sub-objectives and three means objectives with ten sub-objectives. The conceptual model and the several propositions emerging from our findings imply a rich agenda for further research.

Keywords: Adoption, CRM, Contingency Theory, Value-Focused Thinking.

INTRODUCTION

Given that CRM by necessity is integral to a business's system, its introduction poses a considerable challenge to businesses which are not yet ready to adapt their behaviour to the system (Forrester Research, 2009). Indeed, many practitioners and researchers suggest that it is this inability to adapt their behaviour which leads CRM to fail in fulfilling businesses' expectations (Forrester Research, 2014; Rigby et al., 2002).

There is a problem regarding Customer Relationship Management (CRM) system adoption within organizations. More recently, Kim et al. (2012) pointed out that of those organizations that invested in projects of CRM system adoption, about 70 per cent, came to the conclusion that there was no visible improvement. In the literature, the most frequently cited reasons for the lack of benefits realization from CRM system adoption are: first, a limited strategic planning focus with respect to CRM systems, second, a lack of clarity or organizational objectives for CRM adoption (Finnegan and Currie, 2010).

Chien and Moutinho (2000) studied relationship marketing, in general (not just CRM), using an SCT approach and found that relationship marketing was most appropriate when a supplier had a strong reputation and the products/services were more intangible. They also found that customers tend to project utilitarian benefits provided by the supplier into the future. In examining Key

ALHussan, AL-Husan, and Fletcher- Chen (2014) found that intensity of competition, customer complexity, ownership structure, and cultural issues were contextual factors that influenced

relationship development in B2B situations in Jordan. Li (2011) examined the conditions that foster the use of marketing metrics in CRM performance.

Rogers (1983) on innovation decision process provides a conceptual framework for investigating innovation adoption. Rogers (ibid.) suggests that the decision to adopt a system into a company unfolds as a series of stages, flowing from knowledge of the existence of an innovation through to persuasion, decision, implementation and confirmation.

Ko et al. (2008) adapted the innovation decision process by Rogers (1995) and focused on two main stages of this theory: persuasion, which they referred to as perception, and implementation. The perception stage refers to cognitive beliefs underpinning an attitude towards CRM benefits. Ahearne et al. (2012) suggested that a CRM program needs to be designed and implemented to optimize that the strategic fit with individual customers. They concluded that CRM is an important strategic marketing tool that can be used to create a strategic competitive advantage. And yet, early approaches viewing CRM as another technology have not generated return on investment (Forrester Research, 2014). In fact, given that CRM by necessity is integral to a business's system, its introduction poses a considerable challenge to businesses which are not yet ready to adapt their behavior to the system (Forrester Research, 2009).

A large amount of research has examined how to successfully implement CRM (Foss et al., 2008; Holger et al., 2011; Palmatier et al., 2008; Pardo et al., 2014; Payne & Frow, 2005).

Despite the efforts of Ko et al. (2008), their study is limited to the effects of few organizational characteristics (i.e. organizational size, CEO age, etc.) on CRM adoption, ignoring some other important organizational factors/settings. This is a major drawback since CRM adoption is a complex one, as it depends on many factors, such as strategy and customer orientation.

Building on insights gleaned from different views and domains, this paper attempts to investigate the influence of a wide variety of factors on individual perception of CRM and subsequently CRM implementation across the organization.

CRM is not only a technological tool, but also a way of improving the bottom-line of a company by having a more effective and efficient relationship with customers. A strategic planning focus for CRM systems hence allows for enhancing shareholder value of an organization by systematically identifying objectives and by measuring the results of the CRM system over a period of time. In our review of the literature, such objectives have not been very well defined. Hence we argue that failure of CRM system adoption in companies is a consequence of a lack of a strategic planning focus, which can be resolved by identifying and defining CRM system adoption objectives.

THEORETICAL BACKGROUND

CRM adoption

In the literature, there are several studies about CRM adoption, which are mainly exploratory in nature. Although some research on CRM values does exist in the literature (e.g. Payne and Frow, 2005) our review of the literature however did not find any study that clearly defined value-based objectives for CRM system adoption. This gap in the literature provides motivation for us to systematically define such objectives, which will help with the success of CRM systems and hence provide a strategic frame of reference for CRM systems. CRM system adoption is expected to help companies gather information, analyses data and deliver efficient customer support.



Throughout CRM system adoption, companies should review not only their business focus, but also their organisational culture and their business processes, and they should move from a product-centred view, to a customer-centered view (Payne, 2006). Additionally, if a company adopts a CRM system with the main objective of following a “trend”, it is likely to result in failure, as it will probably overlook the steps of the process that need to be accomplished before even attempting to implement the system (Hillebrand et al., 2011).

Based on prior research and drawing on theoretical support from the adoption model of Ko et al. (2008), the conceptual model of this study is depicted in Figure 1. Two central components of CRM adoption put forward by Ko et al (ibid.) are specifically adopted here. First, employees attempt to judge the salient characteristics of the innovation and form an attitude towards the innovation. Without such information (i.e. employee perceptions), organizations may hesitate to invest in CRM if there is uncertainty about the benefits and costs of implementing CRM. Second, the two-stage model suggests that employee perceptions may influence an organization’s decision to implement specific CRM strategies/technologies across. Hence, the intermediate capability of employee perceptions is examined here to explain the implementation of CRM throughout the organization.

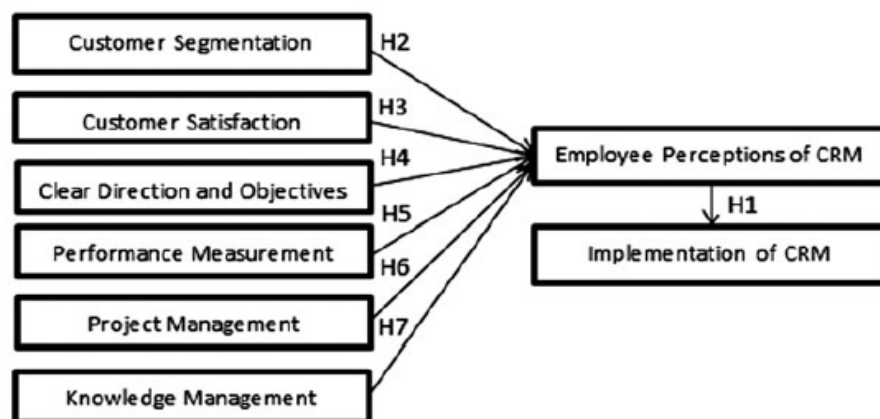


Figure 1. Conceptual framework

Based on related literature from both business and IS literatures (Reinartz et al., 2004; Rigby et al., 2002) it was hypothesized that six factors influence employee perceptions of CRM: customer segmentation, customer satisfaction orientation, clear direction and objectives, performance measurement, project management and KM. This is in accordance with the commonly agreed notion that CRM should be addressing three main perspectives: customer orientation, strategy and technology (Payne & Frow, 2005) and that only when all these three perspectives work in concert can a holistic understanding of the CRM adoption emerge.

As shown in Figure 1, the perceptions of employees (dependent variable), in relation to CRM, tend to mediate the impact of adoption factors (independent variables) on the implementation of CRM strategies by an organisation (dependent variable). The following sections will discuss each variable and then describe the research methods along with the findings from this study.

Contingency theory

The foundations of contingency theory can be found in the early organizational theory literature (Galbraith, 1977; Van de Ven, 1976; Van de Ven & Delbecq, 1974). These authors contended



that the ‘best’ structure was contingent upon the environment in which the organization existed. They suggested that there was an environment–structure–performance relationship for most organizations. These early theorists moved away from the traditional management approaches of there being ‘one best way’ to manage and structure organizations.

As CT began emerging as a theoretical base in management, CT was also applied in marketing (Adler, 1967; Hunt, 1976; Hunt & Johnston, 1977; Naumann & Lincoln, 1989; Ruekert et al., 1985; Spekman & Stern, 1979; Webster & Wind, 1973). More recently, Homburg, Artz, and Wieseke (2012) used an SCT approach to study the strategic fit of marketing performance measurement systems. Clearly, numerous aspects of marketing strategy have benefited from an SCT approach.

Ahearne et al. (2012) specifically used a CT approach in their discussion of top-down versus bottom-up CRM implementation. They suggested that a CRM program needs to be designed and implemented to optimize that the strategic fit with individual customers. They concluded that CRM is an important strategic marketing tool that can be used to create a strategic competitive advantage.

In the following sections, we present our contingency conceptual framework (Figure 2) and set of related propositions linking the supplier and customer in CRM activity. The framework contends that the appropriateness of CRM is contingent on a number of contextual factors.

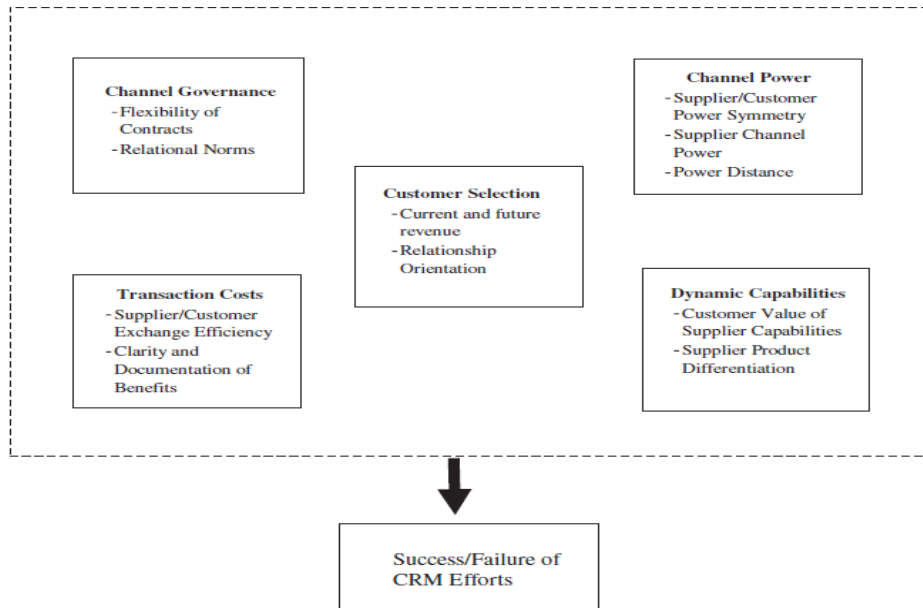


Figure 2. A conceptual framework of factors affecting CRM adoption

Value-focused thinking and CRM

Values have been considered as principles that people adhere to and use to evaluate situations accordingly, and hence they form a good basis for developing objectives. As Locke and Latham (1990) note, objectives are necessary, as they are the goals or an end of an action. Value-based objectives have been proven to be superior to those based on mere alternatives, or through the classic top down approaches.

As in other Information Systems' contexts, in the planning of CRM system adoption, identifying the CRM objectives can enhance the understanding of the values of decision makers.

While Ko et al (ibid.) study demonstrates CRM adoption as a multi-stage process, it examines only the impact of firm characteristics, such as firm size and age, on the adoption process. Further scope exists to examine the influence of a wide variety of factors, which reflect a number of different themes and perspectives, on the adoption process. In discussing factors explaining CRM adoption, the authors base on the three main perspectives that a CRM system should cover: customer orientation, strategy and technology. These perspectives are rooted in the business and IT disciplines.

METHOD

This study is of review type. The purpose of this study is to look at the present state of research in CRM research that highlighted the challenges. We followed the same methodology as that proposed by Keeney (1992, 1994), and adopted it using the Information Systems and Decision Science fields of knowledge.

Data collection

In order to achieve a more parsimonious set of the objectives for CRM system adoption, a three steps approach was adopted.

Step 1, a pre-test was conducted with three specialists who had both an academic and a consultancy background and also a high level of knowledge about CRM system adoption. The objective of this step was to assure the face validity of the items and their correct wording. This step resulted on the elimination of 30 items, either because they did not make sense, or because they were repeated. The 71 remaining ones were then translated from English to Portuguese (this translation was validated by applying the back-translation technique).

Step 2, a pilot test was conducted, using a sample of Masters Students (with a background in CRM systems) from a Portuguese university. After a brief explanation of the research objectives, participants were asked "In your opinion, in order to maximize the success of CRM adoption, it is important to:" For each item on the list, the respondents had to rate them on a Likert scale (1 strongly disagree to 5 strongly agree). We then conducted data analysis as describe in the next section.

Step 3, the means objective instrument and the fundamentals objectives instrument were further explored and tested. The final survey (with the 55 items) was sent to 1,000 European organizations (drawn from the Dunn and Bradstreet database of companies that operate in Europe). Additionally, a third follow-up was done by telephoning each organization to ask them personally to participate in the survey. A total of 210 valid responses were gathered on the third step of this research phase.

How to minimize CRM risks

In order to minimize risks, the CRM project of a small mobile telephone company was supported by a business case, where units of measure were implemented to record the tangible benefits of the CRM software. These measurements included: customer waiting time on the phone, the number of calls received per hour, and the number of customer calls resolved during the first interaction, amongst others. A Chief Information Officer (CIO) of an energy company considers that one way to minimize risks during a CRM project, is to implement the CRM system in a gradual way, as it is thus easier to control, is more responsive to employees' expectations, and



organizational changes are more easier to manage. This CIO claimed that his company first adopted CRM software, before trying to improve its organizational processes.

During the first CRM implementation, the company customized 60 per cent of all the CRM software templates, however, during the last phase of implementation, this percentage was reduced to just 15 per cent.

Customer selection


- *Revenue/profitability*

The first, and perhaps the most significant, cause of failure in CRM is the poor selection of which customers to target. Hillebrand et al. (2011) refer to this blanket approach to CRM as a ‘ceremonial adoption,’ where CRM software is populated with customer data but little substantive action takes place. This approach is almost certain to fail as few, if any, firms have the resources to develop close relationships with all customers. Bradford et al. (2012) noted that some large customers squeeze the supplier’s profitability by demanding deep discounts. For example, Walmart demands deep discounts from suppliers for shelf space. Barnes and Noble demands a 10–20% discount from normal prices by publishers. Although most authors contend that this small subset of high revenue/profit customers should be the target of CRM efforts, this should only be the starting point for customer selection process.

- *Customer’s relationship orientation*

While a customer may be very important to a supplier, the inverse is not always true. Gosselin and Bauwen (2006) found that many large revenue/profit customers had no interest in developing closer relationships with all their suppliers. At the individual level, this would be the buyer’s desire for a close relationship with a salesperson. At the organizational level, relationship orientation would be a manifestation of the customer organization’s corporate culture (De Wulf, Odekerken-Schröder, & Iacobucci, 2001; Wuyts & Geyskens, 2005). Specifically, organizational culture guides business practices within a firm and in inter-firm relationships (Nooteboom et al., 1997).

Association (SAMA, 2015) found that suppliers were twice as likely as customers to describe their inter-firm relationship as ‘relational,’ suggesting that many suppliers do not have an accurate perception of their relationship with customers.



| | | Customer’s Relationship Orientation | |
|----------------------------------|------|---------------------------------------|-------------------------------|
| | | Low | High |
| Value of Customer To Supplier | High | Large Transaction Account (Cell 2) | Strategic Account (Cell 3) |
| | Low | Small Transaction Account (Cell 1) | Emerging Account (Cell 4) |

Figure 3. Customer selection matrix

In cell 4, we find customers who have lower revenue with the supplier, and thus lower importance, but who may have some long-term revenue potential for the supplier.

Our customer selection matrix (Figure 3) provides a simplified way to classify customers as candidates for CRM efforts. These factors draw upon theoretical perspectives grounded in channel governance issues, transaction costs, power distribution within a channel, and the resource-based view (RBV) of the firm. These remaining contextual factors are now discussed.

- ***Segmentation***

Counter to the argument that CRM replaces segmentation with one-to-one customer analytics, Rigby et al. (2002) emphasize that the adoption of CRM without ‘good old-fashioned segmentation’ is doomed to failure. Recently, researchers suggest that customer segmentation is significant for redefining CRM strategies and tactics, and effective resource allocation (Meadows & Dibb, 2012). Hence, CRM serves as a tool to help businesses segment customers based on their potential profitability, and to build up a portfolio of relationships with customers in those segments which are, or have the potential to become profitable (Enz and Lambert, 2012).

- ***Transaction cost theory***

If the total costs generate sufficient benefits to the customer, the exchange is viewed as efficient, from the customer’s perspective. This evaluation is based on social exchange theory in inter-firm exchanges where both the buyer and seller consider the actual and expected costs and benefits related to the transaction and relationship (Morgan & Hunt, 1994).

From the selling organization’s perspective, exchange efficiency is typically determined by revenue and profitability, either for the specific transaction or over the long-term. The total cost of delivery is balanced against expected revenue and profitability over some time period (Gupta & Lehmann, 2003; Reinartz et al., 2004). This long-term view of customer lifetime value has been well studied, and is the primary justification for relationship marketing of all types, including CRM (Bolton et al., 2004; Reinartz et al., 2004; Rust, Lemon, & Zeithaml, 2004).

- ***Customer satisfaction orientation***

CRM is widely acknowledged as a means of retaining customers and increasing customer loyalty through superior satisfaction (Xu & Walton, 2005). Most businesses actively implementing CRM have done so with a view to improving customer satisfaction, since it exploits and leverages interactive communication and genuinely involves customers with businesses to maximize their satisfaction.

In theory, CRM enables businesses to understand their customers and to use this knowledge proactively to create customer value and increase customer satisfaction, especially when businesses share customer information with their suppliers and partners (Feinberg & Kadam, 2002). Thus, Hence, scholars need to investigate how customer satisfaction actually works in practice to support CRM adoption.

- ***Strategic direction***

Researchers suggest that CRM strategy must be incorporated within a wider context of business strategy formulation and implementation process (Reynolds, 2002). Hence, strategic planning at corporate level can help businesses to maintain a strategic fit between business strategy and CRM adoption (Meadows & Dibb, 2008).

- ***Knowledge management***

Since acquiring customer information – and subsequently customer knowledge – is a means to attaining CRM objectives, it is the case that CRM is strongly related to KM (Massey et al., 2001). Alavi and Leidner (2001, p. 8) define KM as ‘the knowledge-based perspective’ which ‘postulates



that the services rendered by tangible resources depend on how they are combined and applied, which is in turn a function of the firm's know-how'. In this respect, KM capabilities can be referred to as 'the organisational learning' as it relates to a person or a group of people. Indeed, KM is regarded as capturing employees' knowledge about many aspects including customers, competitors and products.

DISCUSSION

Apparently, employees' perception of CRM serves as a reasonable proxy for actual organisational implementation. The main premise is that rather than simply implementing CRM technologies, organizations should first consolidate favourable employees' perceptions towards CRM initiatives (Ko et al., 2008). A second premise is that management, while planning ahead and preparing for CRM implementation, would be advised to cultivate a culture that embraces its values.

The surprising findings from this study show that organization orientation around customer satisfaction is not important for CRM. Such results suggest that CRM specifically failed to fulfill the expectations of organizations focusing on customer satisfaction. The results confirm that an organization should provide clear direction and objectives for CRM and a means for evaluating its performance – in order to set up desired expectations amongst all stakeholders.

This study suggests that throughout the adoption process, businesses need to develop a holistic view of CRM and its adoption by focusing on the individual level of adoption, of CRM strategies as something accepted and valued by employees, towards the organizational level of adoption, where strategy is something an organization implements. Moreover, factors affecting CRM adoption can have a different effect on both individual (employees) and organizational elements in the adoption stages.

How to maximize organizational CRM culture

Before adopting CRM systems, organizations must set their objectives for its adoption and they need to change their corporate strategy (e.g. vision, objectives and mission) to focus more on the customer. In our research, many of the interviewees noted that when they tried to adopt a CRM system, they realized that their culture was not prepared for this kind of organisational approach.

This is the same opinion of one CRM manager, who said that top management support was crucial during the first years of CRM in the company: Some important changes had to be introduced, and without this support the implementation would not have been possible.

When attempting to shift their focus more towards the customer, companies often face cultural issues (Coltman et al., 2011). However, in order to create a customer-oriented corporate culture, it is important that the organization is able to develop learning and to encourage capabilities. According to one marketing manager who was interviewed, CRM is a long and possibly never-ending journey.

Nowadays, companies must observe that customers change their data over time, and that new types of customer data may become important. The CIO of one Telecommunication company told us that their new CRM project is having success in using a prototype methodology to implement CRM in several stages, which implicated systems requirements in a dynamic way. This demonstrates the importance for IT to work together with CRM strategy.



To deliver a good customer service, the entire organization (and their business partners) needs to cooperate, so as to communicate and share customer data and experiences. In this way, CRM requires the sharing of information among departments, as a means of creating a picture of the organization's total relationship with its customers. Internal communication is a barrier which affects CRM adoption. A CRM operations manager said that his company is far from experiencing a good relationship among departments and colleagues.

How to ensure an effective relationship with CRM providers

In the literature, establishing a relationship with providers is well articulated (Payne, 2006). It highlights the importance of the planning of each phase of CRM adoption, and also the need to count on prior expertise. The marketing manager of a courier company claimed that there is a need to contract a group of consultants to work together with the project team to adopt CRM software. According to one IT manager who was interviewed, a problem posed by the adoption of the CRM software project was the number of templates that a company had to customize. The interviewee claimed that the first idea was to buy the software, customize it and then implement it. He stated that the necessary workflows were not inserted in the software (mainly those of front-office and back-office automation), and that his company invested a considerable amount of time and money in customizing the CRM software to the reality of the company.

CONCLUSIONS

The implementation of CRM systems is not an easy task, and system failure is unfortunately frequent. The identification of objectives for CRM systems adoption is crucial. Without a clear identification of objectives, including their types and dependencies, it is difficult to manage a CRM project, or to classify project results as being successful.

As a result of our research, we propose a set of strategic CRM system adoption objectives – three fundamental objectives, with a total of eight sub-objectives and three means objectives with ten sub-objectives. The CRM system adoption objectives can be an optimum basis for a CM systems project success. The CRM system adoption objectives proposed in this paper offer both practitioners and academics a basis for further reflection with respect to CRM success. We believe that these objectives will be useful for practitioners, as they are based on values that are held by managers and major stakeholders alike.

This study suggests that different organizations need to identify the CRM objectives which are right for them, by focusing on their particular ideology for building relationships with customers, and rolling this into an overall business strategy. Expanding on the findings, the importance of building CRM strategy around customers must include how the organization plans to acquire, develop, retain and reactivate customers.

Results also suggest that having clear direction and objectives for CRM positively influences CRM implementation in terms of technology. This is linked to Meadows and Dibb's (2012) findings, suggesting that the progress of CRM and its implementation is determined by the ability to plan strategically.

The results indicate that managing changes in CRM projects does not influence CRM perception amongst employees, but influences its implementation. The combination of these results suggests that project management methodologies are paying attention to the management agenda, but ignoring employee perceptions.



CRM adoption is a major undertaking that requires a paradigm shift in organisational strategies, philosophies and structures. As a consequence, businesses are challenged by the difficulty of adopting CRM in ways which help them yield its potential benefits.

This paper adds to the growing body of literature that investigates organizational adoption of CRM. It makes a unique contribution to extant literature by examining the influence of different organizational variables/settings on CRM adoption. Extant research holds the assumption that CRM adoption is binary; organizations either adopt CRM or they do not.

This study suggests that throughout the adoption process, businesses need to develop a holistic view of CRM and its adoption by focusing on the individual level of adoption, of CRM strategies as something accepted and valued by employees, towards the organizational level of adoption, where strategy is something an organization implements. Moreover, factors affecting CRM adoption can have a different effect on both individual (employees) and organizational elements in the adoption stages.

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