

Human-centeredness in CRM approaches: Towards a holistic perspective

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Abstract

The application of IT to marketing through customer relationship management (CRM) software is growing rapidly, but the probabilities of failure remain high. We argue that research in CRM success should focus more on human-centered issues. In this study we introduce a conceptual framework for a holistic view of humans in CRM and apply the framework to previous research on CRM success. The results indicate that in most CRM approaches the image of humans is seen from a managerialist perspective and incorporates a deterministic stance. We suggest that a more holistic approach to human beings as users of a CRM system would benefit CRM implementation.

Keywords: Human-centeredness; CRM implementation; IS success

INTRODUCTION

At present, customer relationship management (CRM) is increasingly geared towards the development and utilization of information systems (IS), which sets up a new domain of interest also for the viewpoint of human-centered use and development of IS. The concept of CRM is based on the relationship marketing paradigm according to which marketing is to establish, maintain, and enhance relationships with customers and other partners, at a profit, so that the objectives of the parties involved are met. This is achieved by a mutual exchange and fulfilment of promises (Grönroos 1997). CRM extends the reach of relationship marketing by utilizing IS to take over the labour-intensive aspects, thereby making it feasible for a wide range of very different customers. At its core, CRM is a simple, intuitively appealing concept: attract new customers, know them well, give them outstanding service, and anticipate their needs and wants (Goodhue et al. 2002).

However, CRM means different things to different people, and it is being implemented in different ways.

To include its different forms, CRM is defined broadly as any application or initiative designed to help an organization optimize interactions with customers, suppliers, or prospects via one or more touch points - such as a call centre, a salesperson, a distributor, a store, a branch office, Web, or e-mail - for the purpose of acquiring, retaining, or cross-selling customers (see Goodhue et al. 2002). CRM takes a broad view of a company's customers by including both current and prospective customers as well as trading partners in the supply chain. To optimize interactions with these customers, it is necessary to collect, store, and manage data on every interaction with them, whether the data comes from a salesperson, a call centre, or the Web.

CRM can include many applications, performing both analytical and operational functions (Goodhue et al. 2002). On the analytical side, a data warehouse typically maintains historical data that supports generic applications, such as reporting, queries, online analytical processing (OLAP), and data mining, as well as specific applications, such as campaign management, churn analysis, propensity scoring, and customer profitability analysis. On the operational side, data must be captured, integrated, and stored from all inbound touch points, including the Web, call centres, stores, field sales, and ATMs. We decided to focus our analysis on elements related to the users of operational CRM applications and sales force automation (SFA) applications in particular. Sales-oriented CRM applications refer to “the use of computer hardware, software, and telecommunications devices by salespeople in their selling and administrative activities” (Morgan and Inks 2001, p. 463). In our study we by the concept “user” refer to salespeople using IT in their selling and administrative activities. Furthermore, the concept user has been used if we refer to a particular CRM role; we use the concept human being if we refer to humans in general or as a group of individuals. We do acknowledge that our decision to study salespeople leaves out many other user groups like the part-time marketers (Gummesson 1990), who in contrast to the full-time marketers (salespeople) do not belong to the marketing or sales department. We have left out people (like helpdesk and call centre employees) in an organization’s service processes, too (Grönroos 2000). However, in order to increase the internal and external validity of our conceptual investigation, we decided to focus on only one CRM user role, that of a sales person.

Vast improvements in information and communication available to the individual salesperson through the proliferation of such innovations as laptop computer, cellular phone, and access to the Internet have provided strategic advances that affect salespeople’s everyday jobs (Moncrief et al. 2006). Research has shown, however, that 55-75% of SFA projects may fail (Honeycutt et al. 2005). The high failure rate may be explained by the gaps that exist between the salespeople and management in SFA perceptions and goals. Moreover, Honeycutt et al. (2005) state that the benefits which firms seek from implementing SFA, appear to be poorly planned, communicated, and evaluated and/or are incongruent with the perceptions and goals of salespersons. Boulding et al. (2005, p. 155) note that “as little is known about how people issues connect to the success of CRM activities, we believe that this is an area worthy of researcher attention”. Payne and Frow (2005) have developed an extensive conceptual framework for CRM, but they have left out the human issues altogether. However, they do emphasize that human issues are a priority area for further research (Payne and Frow 2005, p. 167): “CRM can fail when a limited number of employees are committed to the initiative; thus, employee engagement and change management are essential issues in CRM implementation”. Some researchers have recently included human factors in their model for investigating CRM success (Mendoza et al. 2007), but still, research into the role of the human being in CRM has been predominantly quantitative in its nature, and concentrated on the set of tasks of humans (Moncrief et al. 2006), and not on the qualities of the human being in doing her work.

To form a useful view of customers, companies should be able to portray customers through a viewpoint that allows collecting and utilising customer data in a holistic manner. In order to know what the customers are thinking, how they are behaving, and what their relevant needs are, a human-centered framework for understanding customers is needed. A skilled and motivated salesperson, who at the same time when performing her customer interaction tasks is willing and committed to rely on advanced IT to help in performing her job, would seem ideal for the required tasks: the user, the CRM systems developer and the CRM manager. It would be especially important for the salesperson to understand those human features that could be a prerequisite for selling the products, in particular, to understand humans' behavioural features in regard to their consumption habits (e.g., Chen & Wells 1999). For example, Mitchell & MacNulty (1981) report that humans tend to change as consumers. These changes may be better anticipated if the basic qualities of users guide the CRM persons' reflections. Hoffman & Novak (1996), for instance, argue that it is important to understand humans' spontaneous and mood-related online behaviour in addition to more normative and goal-directed behaviour with respect to humans' tendencies to make purchasing decisions.

It has been suggested that CRM will succeed only after the organization and its processes - job descriptions, performance measures, compensation systems, and training programs have been restructured in order to better meet customer's needs (Rigby et al. 2002). Furthermore, in order to "motivate" users to accept the introduction of CRM, top management support (Croteau and Li 2003) and commitment to change (Chen and Popovich 2003) have been mentioned as success factors. According to Chen and Popovich (2003, p. 685) "management must ensure that job evaluations, compensation programs, and reward systems are modified on a basis that facilitate and reward customer orientation. After all, how people are measured will determine their behavior". Corner and Hinton (2002) maintain that the "system user" is a risk for CRM success in her own right: "sales people are more difficult to manage as system users" (Corner and Hinton, 2002, p. 242). These citations show that a managerialist perspective has been prevailing in CRM success literature. Managerialism (Randle and Brady 1997) can be defined as a collection of management techniques, which may include dimensions like: management is seen as crucial for organisational and social amelioration (managers should have the right to manage); there is an orientation towards the customer and the market rather than the producer; the management of change is seen primarily as a top-down activity; staff in an organisation are seen as relatively easily 'managed' through clear procedures which take well-understood patterns of motivation into account. Managerialist views incorporate assumptions that human qualities in workers are comprised of managers' conceptions of their employees and that these notions tend to become self-fulfilling prophecies in organisations (Bolman and Deal 1997, 105), the interaction between the management and employees is seen as one-directional: humans adjust and express their human qualities in work according to the management's assumptions.

Resistance to change has been quoted as a success factor, too (Fjermestad and Romano 2003; Croteau and Li, 2003). We argue that the notion of resistance to change shows a deterministic view of the user. According to the deterministic view humans and their activities are completely determined by the situation or environment, whereas a voluntarist view regards humans as completely autonomous and free-willed (Burrell and Morgan 1979, p. 6). Sometimes users have been seen in a fragmented manner (Corner and Hinton 2002; Rigby et al. 2002), when researchers have emphasised just one type of human qualities, for example, cognitive or emotional features. In Corner and Hinton (2002, p. 245) this human quality is jealousy or opportunism in the notion of "political infighting", and in Rigby et al. (2002, p. 108) this is shown in their notion of "stalking, not wooing customers", i.e., a lack of sensitivity of the sales person to the acceptable contact frequency perceived by the customer.

We have above shown that the full potential of the human being has not been taken into account in CRM success research. On the contrary, the prevailing image of the human being in

CRM is often either managerialist, deterministic or fragmented. Understanding humans exclusively in accordance with roles and purposes implies that humans can be defined in a given system in terms of division of labour or some other instrumental task, and thus, humans are reduced to something that exists only in relation to particular instrumental needs and purposes (von Wright 1984, Buber 1993). We argue that in order to maintain effective and successful CRM, humans should be understood in a holistic manner. Therefore, in our study, users and their behaviour are seen in terms of indispensable human constituents, intertwining the accomplishment of instrumental roles and tasks and thus having an essential influence on IS usage adherent to such roles and tasks. As the research approach we use conceptual analysis as presented by Järvinen (2001). In this conceptual-analytical study we first analyse the roles and activities of the human being described in diverse operational applications of CRM. Second, we introduce a conceptual framework for outlining the nature of the human qualities in CRM, and finally we apply the framework as our lenses to previous research on CRM success in order to explicate the nature of the image of the human being in CRM success, and to make the variety and limitations of human-centeredness visible in CRM. We conclude by discussing the findings and reflect on their implications.

RESEARCH APPROACH

Concepts are of utmost importance in theory formulation, since they establish, first, the boundaries that define a theory's domain of interest, second, the key constructs and their relationships within that domain, and third, the values or contents those constructs can take on (Järvinen 2001). To establish sound concepts, it is necessary to carry out conceptual analysis. This is especially important in new emerging domains that draw on earlier research drawing on different disciplines with varying underlying epistemological and ontological notions. The recent research on CRM applications is a typical example of this kind of new research area in which concepts are applied from one domain to another. To establish the concept of human-centeredness within the domain of CRM, we carry out a conceptual analysis with a normative orientation that draws on the previous findings of CRM research. In this way our analysis emphasises the utility aspect of the concept of human being in understanding the underlying assumptions rather than representing different interpretations of human-centeredness (cf. Järvinen 2001). Our aim is to bring to the fore and discuss the nature and qualities of humans in CRM theorization, and thus offer explications of the construct to serve as means for further research and also development of CRM applications.

Research questions

- 1) What is the image of the human being in the context of CRM?
- 2) What is the framework for a holistic view of humans in CRM?
- 3) What are the human qualities present in the previous research on CRM success?

Research objectives

- 1) to clarify the specific roles and activities of the human being in CRM
- 2) to be specific of the nature and delineation of the human qualities in CRM
- 3) to explicate the nature of the image of the human being in CRM success, and to make the variety and limitations of human-centeredness visible in CRM

In our analysis, we set the boundaries that define a theory's domain of interest by first defining the roles and activities of the human being in CRM. Secondly, we establish the framework for outlining the nature of the human being in the context of CRM. Finally we use this framework as our lenses to analyse what kinds of human qualities there are within the domain of CRM. In this way we explicate the contents that the concept of human-centeredness can take on within this domain.

In order to investigate the image of the human being in the context of CRM and how the image of the human being appears as a success factor, we selected 9 articles on CRM success

for closer analysis. These articles were selected based on their relevance to the CRM success research. We have evaluated the relevance in terms of the number of citations of the articles found in a Google Scholar search. Only articles with more than 10 citations were selected for further analysis. The numbers of citations of the referenced articles are listed in Table 1.

Paper	Number of citations of the articles in Google Scholar as on 04/29/2007
Chen and Popovich 2003	22
Colgate and Danaher 2000	53
Corner and Hinton 2002	14
Croteau and Li 2003	21
Fjermestad and Romano 2003	15
Morgan and Inks 2001	12
Rigby et al. 2002	140
Ryals and Payne 2001	27
Wilson et al. 2002	40

Table 1. The relevance of the analysed articles.

THE IMAGE OF THE HUMAN BEING IN THE CONTEXT OF CRM

The definition of the operational CRM (Goodhue et al. 2002) explicates some of the most common roles and activities of the human being in the CRM context: the individual as a member of the company's sales organization (e.g., a salesperson) or as a member of the service organization (e.g., a call centre employee). As stated earlier in the Introduction section we by the concept “user” in this study refer to salespeople using IT in their selling and administrative activities. Hence, we have left out many other user groups like the part-time marketers and people in an organization’s service processes. Moncrief et al. (2006, p. 55) point out that “customer relationship focus, technology, global competition, shifting customer preferences and demands, forced downsizing, increased competitive pressure, and other factors have contributed to altering the salesperson role – what salespeople do”. Moncrief et al. (2006, p. 58) have empirically developed a sales position taxonomy. They identified a set of 105 sales activities and as a result of a factor analysis explicated 12 dimensions of selling. Among these 12 dimensions are “relationship selling”, “promotional activities and sales service”, “prospecting”, “office”, and “computer”. Moncrief et al. (2006, p. 58) furthermore produced a descriptive classification of 6 groups of salespeople: consultative seller, new business/channel development seller, missionary seller, delivery seller, sales support, and key account seller. The activities included in the “computer” factor are: internet use, work on the web, checking e-mail, learning software, entering data on laptop, collecting database information, and presentation with laptop. However, also other factors include several computer related activities such as planning selling activities (in the “relationship selling” factor), checking customer inventory (in the “promotional activities and sales service” factor), and filling out expense reports (in the “office” factor).

In their sales roles, human beings are often seen in terms of knowledge and communication (Zablah et al. 2004; Tanner and Shipp 2005). Zablah et al. (2004) introduce knowledge and interaction management as the two major sub-processes of the CRM macro level process. This emphasises the cognitive qualities of human beings, such as knowing. Whether they can articulate it or not, salespersons possess substantial amounts of knowledge about individual customers and their needs and preferences (Zablah et al. 2004). Knowledge management is seen as a process concerned with all of the activities directed towards creating and leveraging the market

intelligence that firms need to build and maintain a portfolio of customer relationships that maximizes organizational profitability. Here interaction refers to any instance in which two active parties, which have the ability to exert influence upon each other, engage in the exchange of values. Many of the essential job functions of the salesperson require communication with the customer (Tanner and Shipp 2005). Buyer-seller interactions do not exist in isolation but rather occur within the context of an ongoing relationship (Grönroos 2000). The extant CRM literature suggests that interactions should remain consistent, relevant, and appropriate over the course of a relationship's lifecycle (Khirallah 2000; Ragins and Greco 2003). Therefore the interaction management process is highly dependent upon the human resources of a firm. Salespersons' ability to leverage their understanding of individual customers and human behaviour often has a substantial impact on the outcome of exchange episodes (Zablah et al. 2004).

FRAMEWORK FOR A HOLISTIC VIEW OF HUMANS IN CRM

Generally the various conceptions of the human being can be seen as different combinations of two main elements: the first element refers to *the number of the basic modes of being*, and the second element to *the structure of the basic modes of being* (Figure 1). These two elements are the dimensions by which the notions of the human being can be categorised and summarised based on philosophical work. The first element is based on the research results in Rauhala (1983). Rauhala (1983, p. 19) states that it is common to distinguish between monistic, dualistic, pluralistic, and monopluralistic or holistic models of the human being. For example, *monistic conceptions* are based on the idea that the human being consists of only one basic mode of being. In general this one mode is matter. *Dualistic models* consider that, in order to understand the human being two different modes of being must be presupposed (Rauhala 1983, p. 19). Usually these two modes of being are mind and body. Different conceptions based on a two-aspectual interpretation of the human being are quite common (Rauhala 1983, p. 19). In the *pluralistic conceptions* it is presupposed that the human is actualised as many kinds of subsystems (e.g. vision, digestion, memory, and emotional), which have their own structure and thus also relative independence. In this way the 'number of the basic modes' is one method of categorizing different notions of the human being.

The current multidisciplinary research is often based on a pluralistic view: research concerning humans is focused on a certain subsystem in a particular context, for example, human information processing in requirements analysis (Barnard and May 1993) or, development of trust in virtual teams (Jarvenpaa et al. 1998). A limitation of the pluralistic conceptions is the difficulty in gathering dissimilarity and stating arguments for the human being as a whole. An attempt has been made to solve this limitation within the *holistic conceptions*, which assume that *the human being is actualised in more than two modes of being and that these modes are fundamentally different*. Without the simultaneous existence of all of the modes it is not possible to consider a creature as a human being (Rauhala 1983, p. 19-21).

In order to be able to define a holistic notion of the human being, *the structure of the basic modes of being* (Wilenius 1987, 1989) is in our framework connected to the number-based categorization of Rauhala. This second element in our framework, the structure of the basic modes of being, refers to the different basic qualities of the human being. With respect to these basic qualities Wilenius (1978, p. 10-14) states that the human being can be seen as a physical system, as an organic system, as a mental-psychical system and both as a social and cultural creature. *Physical system* denotes that the structure (e.g., bones and muscular system) and movements of humans can be explained, for example, by the laws of mechanics. From this point of view the human being is often conceptualised in terms of ergonomics. A special feature of the human *organic system* is a well-developed central nervous system, which has implications on human behaviour in terms of, for

instance, technophobia. Incorporated in this negative affective state is a strong physiological component, which emerges as tension and arousal of the central nervous system. This state may be experienced without the necessity of conscious, rational appraisal, i.e., people may experience anxiety in a tacit manner. The human being as a *mental-psychical creature* is a being with unconsciousness, consciousness and self-consciousness. A classical way of delineating conscious activities is to separate thought, emotions and will. Correspondingly, a common way of conceptualising humans is to build the usually underlying definition of the human being on the basis of thinking and other conscious activities. Frequently the modern notion of the human being is intellectually emphasised: humans are conceived of as primarily perceiving and thinking creatures that plan their actions and circumstances.

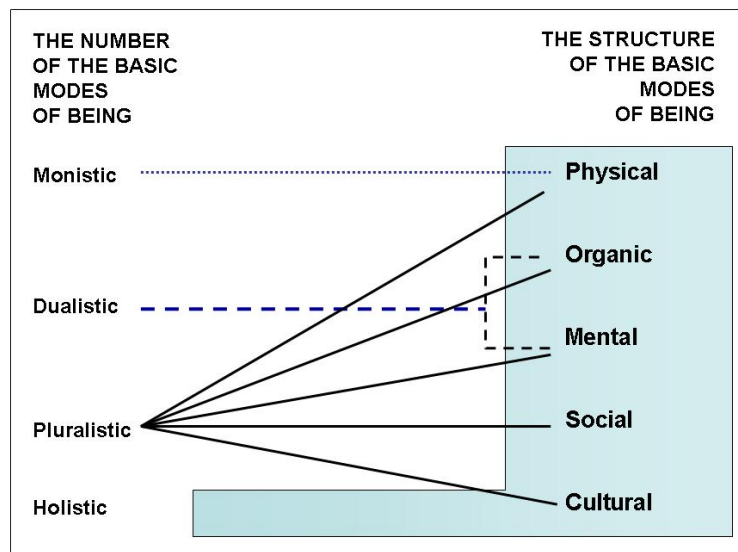


Figure 1. Framework for a holistic view of humans in CRM.

Further, according to Wilenius (1978, p. 13), the *social and cultural* are also structures of the basic modes of being. There the human being is seen in a particular relationship to its environment. In other words, social is a quality of an individual but the nature of this characteristic leads humans to create diverse interactive human networks and social structures. A more recent stance is expressed by postmodernism, which assumes that humans are not determined by instincts, laws, needs, or systems. Instead, human behaviour is open-ended, changing, and creative. Both human nature and knowledge are being created and laid down in the very acts of humans living. This means also that human behaviour can only be understood by ‘reading’ the broader context of life and history within which the behaviour occurs. The definition of the cultural mode of being includes the social mode of being. These two modes are often seen as intertwined in delineations which apprehend the cultural mode as manifested in social life as symbols, heroes, rituals, and values (Denzin 1992, Hofstede 1997). A noteworthy implication of the holistic viewpoint for analyses of CRM is that all humans possess features of the physical, organic, mental, social and cultural modes of being.

These two elements i.e., the number of the basic modes of being and the structure of the basic modes of being together form the basis for our conceptual framework for outlining the multiplicity of the human being as a whole (Isomäki 2002, p. 27-38; 2007). In the framework (Figure 1) *dualistic is connected to physical and mental*, since it is seen as the most common case according to Rauhala’s (1983) analyses. Pluralistic and holistic refer both to all five basic modes of being, but *they differ in that pluralist notions do not see connections between the different basic*

modes of being, whereas the holistic does see them as connected. In this way it is possible to define a holistic notion.

Where the nature of the human being is delineated in the context of CRM, the human being is seen as an actor. This is inherent in the term ‘user’, which refers to a human being who uses computers. It is also in accordance with the tool perspective of computer artefacts: people use IS as tools for something they consider worth doing. Thus, the basic human modes of being are understood as active elements through which the human being is relating to IS. According to this active view, the different basic modes of being each to some extent contribute to a continuum of an active process within which the human being as a whole is active with the system (Isomäki 2002, p. 38-43). This underlines three notable characteristics in human action. First, the hierarchical nature of the basic human modes of being is also active by nature: within human action the different modes interact with each other. Second, in human action there are both conscious or explicit and unconscious or tacit dimensions which both contribute to human experience. Third, the tacit and explicit dimensions are intertwined in the basic human modes of being. This is because humans are not conscious of all the aspects in their own experiences within their life situations. Therefore, it seems that in order to understand the active human being as a whole, we need to pay attention to both the interacting basic human modes of being and their tacit as well as explicit features in human behaviour (Isomäki 2007). This requires a holistic perspective on the human being as a user of CRM applications.

From a more holistic point of view the very nature of human action may be illustrated with the help of studies that draw on the works of two philosophers, John Dewey and Michel Polanyi. Cook and Brown (1999) describe human knowledge creation by building on Dewey’s concept ‘productive inquiry’. Human knowledge creation is seen to occur within two intertwined elements: knowledge and knowing, which include the explicit and tacit dimensions in human action. Similarly, Jones et al. (2007) argue, by drawing on the work of Polanyi, that the greatest part of our knowledge is subservient to our goals and actions. Further, Cook and Brown (1999) offer conceptual means in transcending the subject-object dualism in regard to the IS-user relationship by defining a part of human action involving static human features and another part as consisting of affordances that emerge dynamically in an interaction. Dynamic affordance refers to the sense of affordance which is reflected within the relationships between characteristics of the world and issues of inherent concern to people, such as the basic human modes of being. These modes of being can be understood as static characteristics in that they are inherent in all individuals. Usually they provide humans with the ability and need to be physical, organic, intellectual, emotional, social, and cultural creatures with their own will. However, the actual behavioural implications of the basic human modes of being emerge within the interaction between humans and ICTs. Likewise, the bits of knowledge that members of a team may possess are a property of that social context, and become facilities or frustrations within interaction. The facilities and frustrations within this dynamic interaction are the dimensions of dynamic affordance. This is particularly true of objects that are the product of human design: what they afford may give rise to shape and fluidity (facilities) or incoherence and clumsiness (frustrations) in human activities.

In a nutshell, dynamic affordance puts emphasis on the experience that emerges from the basic human modes of being within interaction of humans and the world. The structure of the basic human modes of being indicates the richness of that interplay and the emergent experience. Because this emerging experience is an implication of the (static) basic human modes of being, it is important to consider them as constituting elements of users’ experiences in using CRM applications. Consequently, understanding human action requires insight into the different basic human modes of being and their implications within the dynamic affordances that occur between humans and IS as well as customers and salespersons during the process of CRM.

THE HUMAN QUALITIES PRESENT IN RESEARCH ON CRM SUCCESS

In this section we shall apply the human-centred framework for a holistic view of human beings in the CRM success literature, and demonstrate the human-related success factors (Table 2). We shall add the notion of the basic human modes of being and the structure of the basic human modes of being present in the corresponding CRM research paper. The following is a more detailed account on our analysis.

Paper	Human qualities present in the reviewed research paper	Number of the basic modes of being	Structure of the basic modes of being
Chen and Popovich 2003	<ul style="list-style-type: none"> • Top management should support the CRM implementation • The project champion should persuade top management for continuous change efforts • Management should show commitment to change job evaluations, compensation programs, and reward systems 	Dualistic	Social and cultural structure
Colgate and Danaher 2000	<ul style="list-style-type: none"> • The performance level of a personal banker 	Dualistic	Social and cultural structure
Corner and Hinton 2002	<ul style="list-style-type: none"> • Political infighting • Vested interests • Selfishness • Unwillingness to cooperate 	Pluralistic	Social and cultural structure
Croteau and Li 2003	<ul style="list-style-type: none"> • Top management should support the CRM implementation • People should possess knowledge management capabilities 	Dualistic	Social and cultural structure
Fjermestad and Romano 2003	<ul style="list-style-type: none"> • Resistance towards a new CRM system 	Dualistic/pluralistic	Social and cultural structure
Morgan and Inks 2001	<ul style="list-style-type: none"> • Salespeople are opportunistic in holding their own information about customers • Resistance to anything new 	Dualistic	Social and cultural structure
Rigby et al.2002	<ul style="list-style-type: none"> • Resistance to change • Insensitivity to customer's perceptions 	Pluralistic	Social and cultural structure
Ryals and Payne 2001	<ul style="list-style-type: none"> • Lack of skills in building and using the system • Low awareness of the benefits of a marketing database • Unwillingness to cooperate • Opportunism 	Pluralistic	Social and cultural structure
Wilson et al. 2002	<ul style="list-style-type: none"> • Role and qualities of a champion/sponsor • User involvement in system design 	Pluralistic	Social and cultural structure

Table 2. An analysis of the human qualities in selected CRM success literature.

Chen and Popovich (2003) explore the critical components that can enable (or hinder) the successful implementation of CRM initiatives and introduce a CRM implementation model that integrates the dimensions of people, process, and technology. In their account of people as success

factors, Chen and Popovich (2003) take the user as a potential resister to any change. They stress the managerial view of a need for top management support and commitment to change “the way people do their work today”. A “stick-and-carrot” principle is seen as the driver for changing humans. Chen and Popovich (2003, p. 685) suggest that “management must ensure that job evaluations, compensation programs, and reward systems are modified on a basis that facilitate and reward customer orientation. After all, how people are measured will determine their behavior”. The human being is seen only as a one-dimensional creature, as an instrument to be utilized by management in order to fulfill CRM goals. However, the human being is noted to need adequate skills to use a CRM system, be motivated to adjust to the evident organizational changes as organization needs to become more customer-oriented, and is seen as optionally adjust her behavior if compensation is increased in order to decrease her resistance to organizational changes. We can note that the human being is in this study basically described from a dualistic viewpoint, but the social and cultural structures of the human basic modes of being are present.

Colgate and Danaher (2000) examine the effects which the implementation of a relationship strategy can have on overall customer satisfaction and loyalty. Their results show that both positive and negative effects are possible. A strategy implementation rated as excellent will raise overall customer satisfaction and loyalty more than if such relationship strategy is not in place. Conversely, a strategy implementation rated as poor results in lower overall satisfaction and loyalty among customers engaged in such a strategy compared with those who are not. In this study the focus is on the individual: the role of a personal banker. Here the human being has been instrumentalized as the coming about of the relationship strategy in practice. There are no revelations as to the human qualities that would in this context explain an excellent versus a poor personal banker’s performance. The main measure used to judge the personal banker’s performance is the degree to which he/she has performed in the mind of the customer. The human being is seen as an instrument to enable the relationship strategy of the bank. Even though the prevailing mode of the human being is that of a performer, we argue that the human being is described from a dualistic viewpoint, but again the social (facing a customer over a bank counter) and cultural (customer relationship) structures of the human basic modes of being are present.

Corner and Hinton (2002) show an example of how political infighting may result in the failure to obtain committed support for a CRM implementation, and how a vulnerable system sponsor may risk the CRM implementation. In their case a sales director declined to take ownership of the implementation because of an inherent conflict with another sales director from a different sales area. Politics and vested interests may be interpreted as evidence of humans resisting any change, wanting to keep up the status quo, and of a conservative attitude towards anything new. The human being is described as showing emotional qualities such as selfishness and unwillingness in cooperating with colleagues that he/she dislikes. The users have been described as having been instrumental in defining their own processes so that these were kept in line with the organizational culture. We therefore argue that in Corner and Hinton (2002) the human being is described from a pluralistic viewpoint. The humans responsible for the execution of the CRM implementation project hold positions within a sales organization. Hence, the basic human modes of being have been described in an organizational/structural context.

Croteau and Li (2003) state that CRM technological initiatives are successful, when adequate top management support and accurate knowledge management capabilities, supported by information technology, are in place. In their study the managerial perspective dominates. Top management support is seen as a crucial success factor. All the other users in CRM are expected to work more “effectively”, “improve” their customer interaction episodes, and express willingness “to share” knowledge with others in the organization. The user is supposed to become more efficient, improve his or her performance and increase openness and willingness to cooperate with others by sharing knowledge with them. The human being is seen as an instrument and is described as possessing only a few qualities like the quality of a “performer”. We maintain that in Croteau and

Li (2003) the human being is seen from a dualistic viewpoint but the social and cultural structures of the human basic modes of being are present.

Fjermestad and Romano (2003) suggest that the human reaction towards a CRM system in the form of actualized resistance would be a potential factor affecting successful CRM implementations. This notion of resistance in the context of interaction theory (Markus 1983) is comparable to the notion of dynamic affordance. We argue that Fjermestad and Romano (2003) investigate human being in a dualistic manner: the human being either resists or supports the use of a CRM system. However, embedded in their research is a pluralistic image of the human being. This is indicative in their account of various “people determined” success factors, which are argued to enhance the usability of a CRM system. Again, in this research the social and cultural structures of the human basic modes of being are present.

Morgan and Inks (2001, p. 471) noted that “it is human nature to resist change, simply because it is a deviation from status quo”. They maintain that without the perception of an advantage, the sales force is less likely to whole-heartedly use the SFA system and suggest that to address this type of resistance, management needs to clearly demonstrate the advantages, such as more selling time, shorter sales cycle, less administrative hassle, etc., of using the SFA system. Many salespeople feel that the more information they possess about their customers, the more dependent their organization comes (Morgan and Inks 2001) on them. Therefore salespeople may be reluctant to transfer their customer knowledge base into a format that is standardized, readily accessible, and easily transferable (Morgan and Inks 2001; Wikström 2006). As a solution to the fear of losing power, Ba et al. (2001) suggest to use organizational incentives in motivating salespeople to share their customer information with others. This strategy refers to the “stick and carrot” ideology in relations between a manager and subordinates and we argue that it reflects a realistic conception of the human being, e.g., a salesperson. We argue that here, too the human being is basically described from a dualistic viewpoint, but the social and cultural structures of the human basic modes of being are present.

Rigby et al. (2002) have pointed out how several qualities of salespeople could be important in maintaining and enhancing customer relationships. Salespeople should be motivated to become more aware of the needs of their customers, i.e., they should be sensitive to the various ways of how customers express their wants and needs during the customer interaction episodes. “Stalking, not wooing, customers” points out the fact that salespeople often build relationships with customers they like but who necessarily aren’t the most profitable ones, or try to build relationships with the right customers in the wrong way (Rigby et al. 2002, p. 108). This success factor relates to the psychological qualities of the human being in contacting a customer: emotions like sympathy direct the behaviour of the human being, but at the same time a need for a goal-oriented pragmatism should be the proper way to direct the conduct. Because, in Rigby et al. (2002), the human being is described as having been actualised of various emotional and cognitive qualities like motivational, empathetic, and pragmatic qualities, we argue that the human being is described from a pluralistic viewpoint. The human being is seen as an organizational actor, who must adapt to organizational goals and be flexible to adjust to the changes towards which the customer-oriented processes direct the organization. Therefore the social and cultural structures of the human basic modes of being are clearly present.

Ryals and Payne (2001, p. 21) explicate some barriers to successful implementation of CRM. The lack of skills of the user of a CRM system is one barrier, especially the lack of analytical skills during the implementation – “the skill of asking the right questions”. The individual is seen as conservative and opportunistic in terms of her wanting to hold her proprietorial ownership of a customer, not wanting to share information about a customer relationship, and not wanting to cooperate with colleagues from different business units. Ryals and Payne (2001) found out that the lack of skills in building and using a CRM system was seen as a major barrier to the implementation of CRM, too. Low awareness of the benefits of a marketing database was seen as an

additional barrier: the users did not sense an affordance by the CRM system. The human being is described from a pluralistic viewpoint as showing conservative and opportunistic behaviour as well as acting individualistically and even selfishly. The social and cultural structures of the human basic modes of being are also present in this study, which is evident in the notion of the opportunistic behaviour by business unit managers.

Wilson et al. (2002, p. 206) argue that “user involvement in system design needs to be face-to-face, not just at a distance through the writing and review of specification documents”. Hence, their study identifies various human qualities in the context of user involvement and considers the human being as an active participator, an “actor” in the design work and not just as an instrument, “a user”. As a factor with limited support to the success of a CRM implementation Wilson et al. (2002) address the issue of cultural change, such as staff willingness to share (customer) data. This notion refers to the need of users to be flexible in changing their perceptions of ownership of organizational resources: customer knowledge. The human beings are seen as organizational actors, who act in various roles such as systems designer, systems sponsor, or actor in a cultural change process. We therefore argue that in Wilson et al. (2002) the human being is described from a pluralistic viewpoint and that the social and cultural structures of the human basic modes of being are present.

DISCUSSION

Our study contributes to the CRM success literature in several ways. First, many researchers have emphasized the need to more thoroughly investigate the “people issues” in CRM (Plakoyiannaki and Tzokas 2002; Chen and Popovich 2003; Boulding et al. 2005; Payne and Frow, 2005; Mendoza et al. 2007). Furthermore, previous research into the image of the human being in CRM has been functional or quantitative by its nature and concentrated on the job functions and work activities (Moncrief et al. 2006). Our work is a first attempt to address these issues and it, instead of only concentrating on the role of the human being in the context of CRM, investigates the qualities of the human being as success factors in CRM, too.

Second, our study provides a conceptual framework for a holistic view of humans in CRM and identifies key elements within the holistic perspective. In this way we are extending the frameworks for CRM by previous researchers (Mendoza et al. 2007; Payne and Frow 2005). By applying the holistic framework we have outlined the nature of the human being in the context of CRM and demonstrated what kind of quality assumptions may be connected to humans in this context. Traditionally human beings are seen in a very fragmented manner in CRM, and most often just one type of human qualities like e.g., cognitive or emotional features are taken into account. In order to understand the active human being as a whole, one needs to pay attention to both the interacting basic human modes of being and their tacit as well as explicit features in human knowledge management.

Third, our study offers managers insight into how the various human qualities of people may be taken into account when managers in various CRM processes assign the appropriate customer interaction and knowledge management responsibilities to humans. To succeed in CRM implementations managers require a holistic perspective on the human being as a user of CRM applications. We suggest that it would be perilous if managers only understood humans in terms of distribution of tasks, in accordance with the roles and instrumental purposes. It is important to focus more on the individual and personal human qualities of people and make efforts to show humans the affordance of the CRM system in their daily practices.

We do understand that our research has its limitations by only concentrating on one role within CRM which is that of a salesperson. Future research should take into account the

managerial and executive roles as well as various other roles in customer service and part-time marketing functions. Furthermore, our literature review was limited to a selected number of articles, which were, however, well cited in academic literature.

We suggest that in the future our holistic framework should be applied to the research of the human beings in CRM in addition to the functional approaches. Clearly a paradigm shift from quantitative to qualitative approaches is needed. Specifically we suggest that researchers would extensively utilize qualitative methods, such as phenomenography (Marton and Booth 1997), as the research method. In this way we could gain more insight into the tacit and sensitive dimensions of the human beings, which cannot be revealed by quantitative methods, because these are too reductive of their nature.

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