Dealing with Duality: Internal Markets and the Role of the Agent in CRM

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Abstract

In recent years customer relationship management (CRM) has garnered high interest from researchers from both conceptual and implementation perspectives. Central to any discussion of CRM is the recognition that organizations have moved from a product- and/or brand-centric marketing approach toward a customer-centric approach (Ehret 2004; Sheth, Sisodia and Sharma 2000), and a focus on external customer relationships is common to the CRM literature. Yet as Grönroos (1994) notes a "relationship approach to external markets will only succeed if the external strategy is underpinned by an appropriate approach to the management of the organisation's 'internal markets'". Despite a recognition of the need to develop internal processes for CRM to assist organization-wide learning about individual customer relationships (Ehret 2004; Reinartz, Krafft and Hoyer 2004; Zablah, Bellenger and Johnston 2004), the internal customer in the CRM process has not figured large in conceptualizations of the CRM process.

This paper presents a conceptualization of the CRM process which incorporates the internal market process and integrates and extends current CRM models.

We also note that there have been calls by CRM researchers for further investigation of employee performance-based evaluation systems and the organizational adoption of customer-focused behaviours for CRM (Campbell 2003), and for CRM training and incentives (Reinartz, Krafft and Hoyer 2004). Such internal marketing issues fall into the purview of agency theory. Agency theory is directed at "the ubiquitous agency relationship, in which one party (the principal) delegates work to another (the agent) who performs that work" and looks at the "problems that can occur in agency relationships" (Eisenhardt 1989; Lassar and Kerr 1996). This has high relevance for CRM management which deals with relationship building deployed by customer-facing employees (Kleinaltenkamp and Jacob 2002).

Consequently, we investigate the role that agency theory plays in the internal organizational processes the firm deploys for CRM, and discuss the implications of the role of the agent in eBusiness.

The extended, integrative conceptual model of CRM we present serves as a new starting point for a more complete understanding of the CRM process that incorporates and recognises the importance of the internal market dimension to CRM success.

Keywords: CRM, CRM process, internal market, agency theory.

Introduction

This paper conceptualizes the Customer Relationship Management (CRM) process by incorporating the overlooked internal market process. We also investigate the role that agency theory plays in the internal organizational processes deployed for CRM. CRM has garnered high interest from researchers from both conceptual and implementation perspectives. Although the literature speaks to the potential benefits of CRM adoption by the organization, both academic and commercial researchers have also noted the relative failure of the majority of CRM projects (Campbell 2003; Gartner Group 2003; Zablah, Bellenger and Johnston 2004). Central to any discussion of CRM is the recognition that organizations have moved from a product- and/or brand-centric marketing approach toward a customer-centric approach (Ehret 2004; Sheth, Sisodia and Sharma 2000; Vargo and Lusch 2004) as they appreciate that customers have differing value and changing needs (Kohli and Jaworski 1990; Narver and Slater 1990) and should, therefore, be marketed to on a differentiated basis. Central also is the recognition that building and managing ongoing relationships with customers is at the core of the marketing concept (Hasan 2003; Morgan and Hunt 1994; Webster 1992), and that the relationship marketing (RM) approach, which explores "relationships, networks and interaction"[1] (Gummesson 1994), is a key contributor to CRM enquiry (Christopher, Payne and Ballantyne 2002; Reinartz, Krafft and Hoyer 2004; Ryals and Knox 2001).

A recent paper by Zablah, Bellenger and Johnston (2004) notes that the literature delivers 5 major perspectives on CRM: (1) as a process; (2) a strategy; (3) a philosophy; (4) a capability; and (5) as a technological tool. In their descriptions of these major perspectives and in their final conceptualization of CRM the focus is on the external customer as the provider of economic value and the site of CRM enquiry. They posit that CRM is "a strategically oriented process concerned with 'producing' an ideal mix of customer relationships" and "concerned with the creation of market intelligence that firms can leverage to build and sustain a profit-maximizing portfolio of customer relationships" (p. 481). In common with others they recognise the importance of process management for CRM success (Campbell 2003; Day and Van den Bulte 2002; Grönroos 2000; McCormack and Johnson 2001; Reinartz, Krafft and Hoyer 2004), and chart the organizational processes by which CRM can be deployed throughout the organization. These they describe as the knowledge management (KM) and interaction management (IM) processes (see figure 1 below).

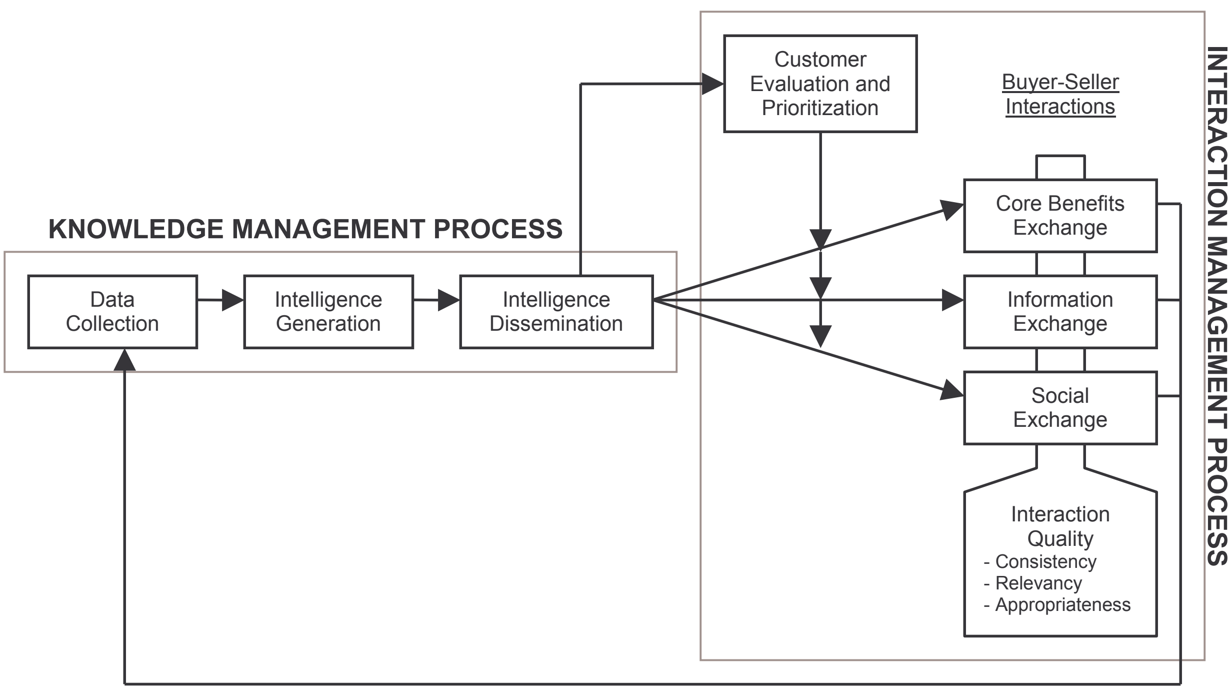

Figure 1. The CRM Process (Zablah, Bellenger and Johnston, 2004)

[1] For the past twenty years the IMP Group has also been discussing interaction, relationship and network issues (Turnbull, Ford and Cunningham 1996).

The Internal Customer

This focus on external customer relationships is common to the CRM literature. Yet as the RM and some CRM literature (Chen and Popovich 2003; Dyché 2002; Hansotia 2002; Ryals and Knox 2001) suggests a “relationship approach to external markets will only succeed if the external strategy is underpinned by an appropriate approach to the management of the organisation's ‘internal markets’” (Grönroos 1994, p.20). [2]

An increased focus on resources and process management for the enterprise is signalled by Srivastava, Shervani and Fahey (1999) who determine that CRM, along with product development management and supply chain management, is one of the three core business processes of the enterprise, and that intraorganizational process competence is a requisite for marketing success. In a later paper Srivastava, Fahey and Christensen (2001) further define this resource-based view of the firm and discuss how market-based assets and capabilities can be leveraged via market-facing or core business processes to deliver superior customer value and competitive advantage. This view encompasses relational (external) and intellectual (internal) assets, and incorporates the three core operating processes articulated in the 1999 paper (above), and non-customer-centric (but customer-connected business processes) processes such as the acquisition, development and deployment of human resources.

Vargo and Lusch (2004), posit that marketing is moving away from the exchange of tangible goods to the exchange of intangibles such as specialized skills, knowledge, processes, and relationships, and further suggest that “designing and building cross-functional business processes” (p.15) and relationship building with customers is intrinsic to the enterprise as a whole. They also suggest that “all employees are identified as service providers” (p.15). This mirrors the views of Grönroos (1994; 1990) and Gummesson (1990; 1987) who contend that all the enterprise’s employees are part-time marketers.

In 1994 Payne, Christopher, Clark and Peck noted that “a relationship approach to external markets will only succeed if the strategy is underpinned by an appropriate approach to the management of the organisation’s ‘internal markets’…we mean both the management and coordination of profit centres within the organisation, and the management of the **internal customer-supplier relationships**” (p. 84, my emphasis). They further detailed a management process to establish and quantify the requirement of **internal customers**, develop systems and procedures to meet the goals of **internal customers**, identify the **internal customer/supplier ‘linkages’** to deliver customer satisfaction, and improve cross-functional working and a heightened service quality for internal and external customers (p. 84, my emphases). They conceptualized the internal market process as part of a RM Chain (see figure 2 below):

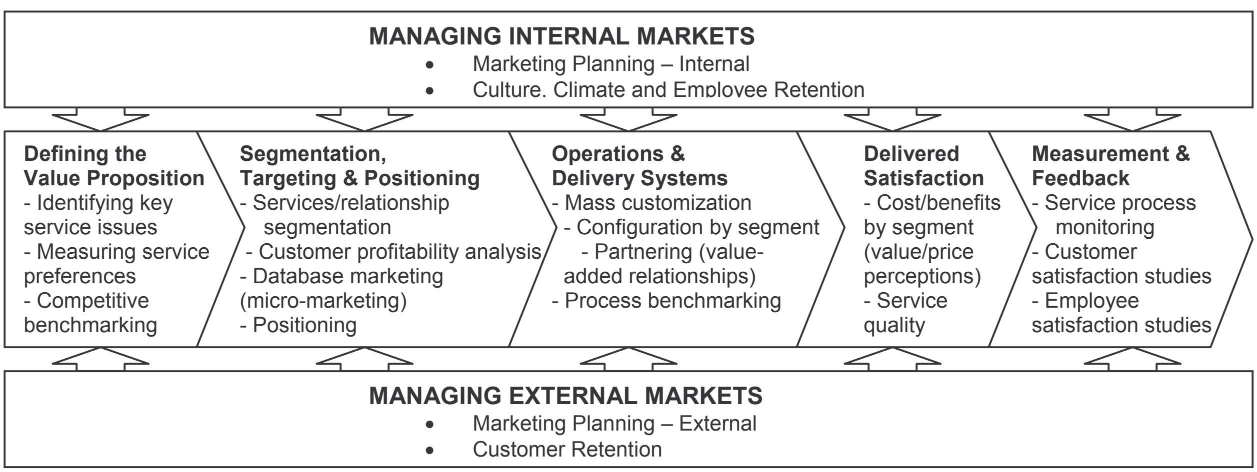

Figure 2. The Relationship Management Chain (Payne, Christopher, Clark and Peck, 1994)

[2] This recognition of the importance of internal markets was also fundamental in the development of the various management techniques deployed under the aegis of total quality management (TQM) (Cole and Mogab 1995). As Vargo and Lusch (2004, p.7) note “the [TQM] techniques were intended to reestablish the focus of workers and the organization on both internal and external customers”.

Furthermore, Gummesson (1994) identified a series of *nano* relationships[3] which were internally directed and noted that although the profit contribution from such relationships may be difficult to measure they were "an organisational and strategic necessity for the [external] market relationships to thrive." In this he was supported by Grönroos (1994) who suggested that "an on-going internal marketing process is required to make relationship marketing successful. If internal marketing is neglected, external marketing suffers or fails" (p.20).

In 2001 Ryals and Knox conceptualised CRM as a series of relationships and showed the internal markets of the firm as a key stakeholder. They also noted that while technological tools enable the enterprise to re-orientate around the customer, CRM requires an organisational culture that is "adaptive and responsive to change" (p. 537), an effective internal communications process to ensure compliance, and CRM adoption metrics to ensure optimal customer orientation of the firm's customer-facing employees (Edvinsson and Malone 1997; Jennings 1997).

Despite a recognition of the need to develop internal processes for CRM to assist organization-wide learning about individual customer relationships (Ehret 2004; Reinartz, Krafft and Hoyer 2004; Zablah, Bellenger and Johnston 2004), the internal customer in the CRM process has not figured large in the majority of conceptualizations of the CRM process.

The CRM Process

The most recent conceptualization of the CRM process (Zablah, Bellenger and Johnston 2004) attempts a macro-process view and asks "what is the requisite input of the CRM process? In other words, what resources or combination of resources (i.e., capabilities) do firms need to possess or have access to in order to build that profit-maximising portfolio of customer relationships?" (p. 479). The paper also notes the organizational resources that can potentially serve as input to organizational processes: (1) physical – property, plant, equipment, raw materials, (2) human – personnel-based resources, training, insight and judgement of individual employees, and (3) organizational – intangibles such as culture, brand image and firm reputation (Barney 1991; Grant 1991). The authors posit that knowledge and interaction management are the major sub-processes of the CRM macro-level process, and note that organizational members have impact on the knowledge management process (p 482), and that the interaction management process is highly dependent upon the technological and human resources of the firm (p. 483). However, due to their external customer focus, the authors fail to illustrate where the internal customer and the requisite internal management processes fit in their conceptualization of the CRM process. If, as they posit, CRM is "a strategically oriented process concerned with 'producing' an ideal mix of customer relationships", then a key customer relationship – that of the internal customer with the organisation – must be included as part of the mix.

The authors further propose a framework for achieving CRM success which details the setting of a RM strategy; defining CRM processes and assigning process roles; assessing the state of CRM capabilities; enhancing CRM capabilities; and monitoring, evaluating and improving of the CRM processes. This framework also centres on the external customer and, while acknowledging the need for clear definition of CRM processes and roles for interfunctional dynamics, does not articulate the parallel requirement for both external and internal processes.

The conceptualisation of Payne, Christopher, Clark and Peck (1994) for a RM Chain (previously shown) which acknowledges the parallel role of the internal customer in the customer relationship process, and the conceptualization of Kleinaltenkamp and Jacob (2002) of their value ("leistungs") management of external and internal resources appear to offer fruitful dimensions to the discussion of the CRM process (see figure 3 below for the Kleinaltenkamp and Jacob conceptualization).

[3] Gummesson posits 30 relationships (R30). Of these 5 are *nano* or internally directed relationships: R6 – market mechanisms that have been brought inside the company; R8 – interhierarchical and interfunctional dependency; R10 – internal marketing to reach the "employee market"; R15 – quality as a bridge between technology and marketing; and R17- the two-dimensional matrix relationship.

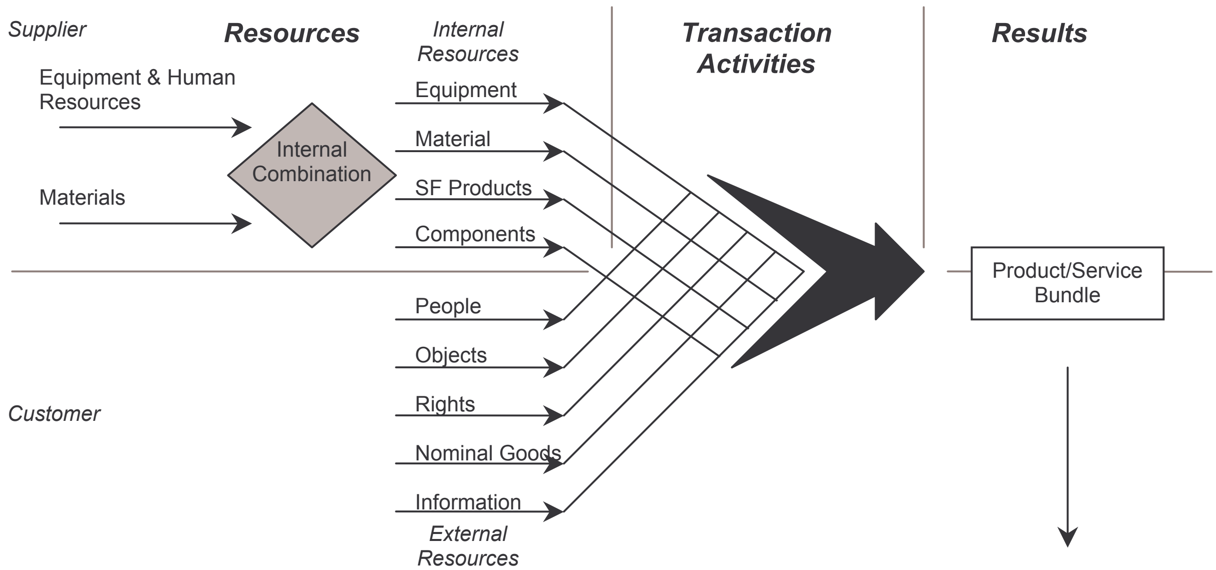

Figure 3. Dimensions of Value Generation (Kleinaltenkamp and Jacob, 2002)

Kleinaltenkamp and Jacob posit that the management of external **and** internal resources and processes is integral to the creation of value and for marketing success. According to this 'leistungs' approach, resources are viewed not as external parameters constraining problem solutions but become a part of the process of problem solution. In such a view, project cooperation and cooperative system design become the norm.

Such a conceptualization of the CRM process which incorporates the internal market process as noted in the Payne, Christopher, Clark and Peck (1994) and the Kleinaltenkamp and Jacob (2002) models, and integrates and extends the Zablah, Bellenger and Johnston (2004) CRM model , is presented below:

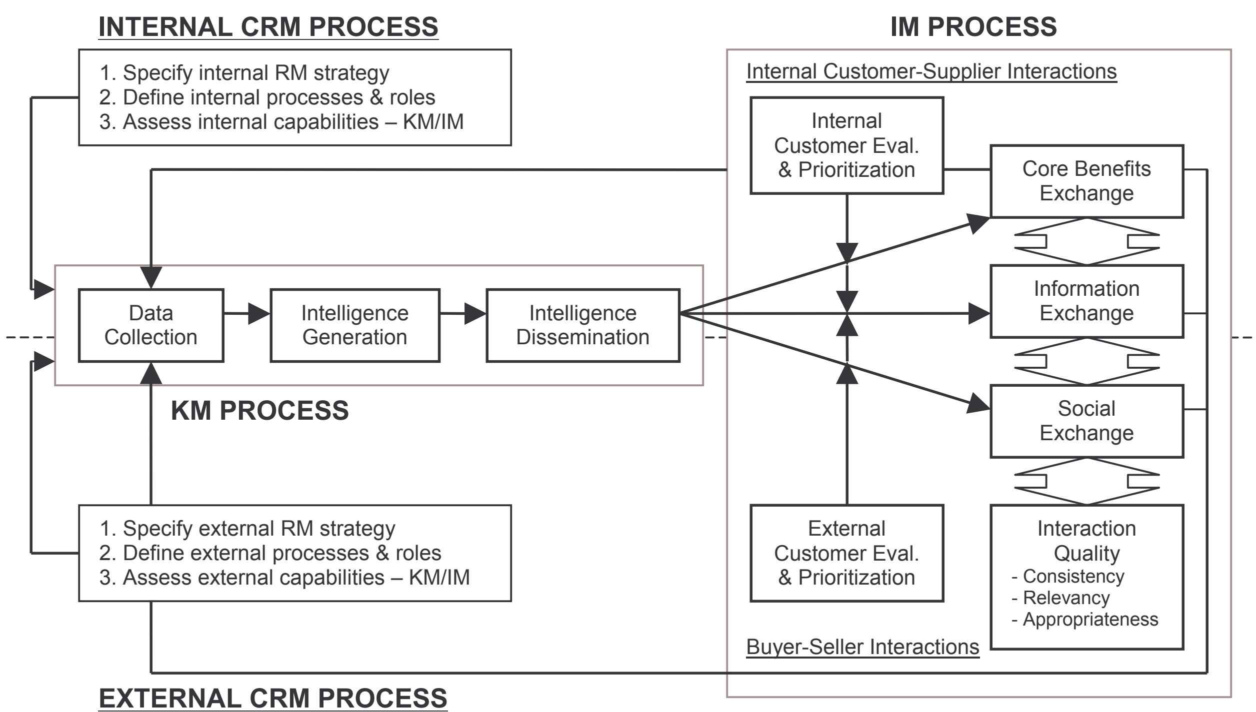

Figure 4. The Integrated CRM Process

Discussion

We suggest that the external KM processes of Data Collection (capturing information on [firms and] markets), Intelligence Generation (converting that data into actionable intelligence), and Intelligence Dissemination (intelligence disseminated to all members of the organization) described by Zablah, Bellenger and Johnston (p. 482) also have relevance for the internal market process. As we have seen (Chen and Popovich 2003; Kotorov 2002; Pan and Lee 2003; Renner 2000; Ryals and Knox 2001), the implementation of the CRM process requires marketers to strategically determine which internal units or individuals of the organization will influence the firm's CRM activities. This determination will require the capturing of information, the converting of that data to actionable intelligence and the consequent dissemination to the internal markets of the organization.

Similarly, the external IM customer evaluation and prioritization processes (p. 483) map onto internal customer requirements. Customer evaluation involves making an informed assessment of the current state of the relationship, and prioritization involves determining the relative importance of individual customer relationships to allocate organisational resources. These evaluations will also have to be made by marketers as they determine how to develop inter-organisational linkages and functional relationships, and once establishing and quantifying the requirements of internal customers determining how to prioritize resource allocation.

The external IM processes are defined by the interactions of buyers and sellers. Zablah, Bellenger and Johnston (2004, p. 483) note that these two active parties have the ability to exert influence on each other and exchange values (Cunningham 1980; Ford 1980, Kotler 1972; Turnbull, Ford and Cunningham 1996), and that interactions can focus on the exchange of core benefits (i.e., services for money), information exchange, social (i.e. interpersonal) exchange and/or any combination of the three (Cunningham 1980; Kalafatis 2002; Metcalf, Frear and Krishnan 1992). They further note (p. 483) that interactions do not exist in isolation but rather within the context of an on-going relationship ((Cunningham 1980; Grönroos 2000; Turnbull, Ford and Cunningham 1996), take place within the context of all preceding relationships (Peppers 1999), and must, consequently, be actively managed for the development of exchange relationships (Reinartz, Krafft and Hoyer 2004).

As we have previously noted, it is axiomatic that internal customer-supplier interactions (core benefits, information, and social exchange) and relationships must also be managed to deliver customer satisfaction, and improve cross-functional working and a heightened service quality for both internal and external customers (Payne, Christopher, Clark and Peck 1994, p 84). Arguably, the internal customer-supplier relationship is exemplary in illustrating the bounded context of existing and preceding organizational relationships

Zablah, Bellenger and Johnston (2004) further articulate the roles that interaction consistency, relevancy and appropriateness play as key dimensions of interaction quality (pp. 483-484). These interaction quality dimensions assist in the creation of desirable relationship outcomes (Bradshaw and Brash 2001; Butler 2000, Pan and Lee 2003; Rheault and Sheridan 2002), interaction satisfaction (Kleinaltenkamp and Jacob 2002; Tellefsen 2002), and optimizing organizational communication efforts (Ansari and Mela 2003; MacDonald and Smith 2004; Naik and Raman 2003) between external buyers and sellers. It is evident that these dimensions of interaction quality must also be present and implemented for an optimal internal customer-supplier interaction process (Chen and Popovich 2002; Pan and Lee 2003; Ryals and Knox 2001).

The Role of Agency Theory in CRM

As we have detailed, the Zablah, Bellenger and Johnston (2004) paper offers a useful perspective on the CRM management processes which deal with (1) knowledge management (KM), and (2) interaction management (IM). As it notes, "the knowledge management process is highly dependent upon the technological and human resources of the firm. From the technology side, CRM technology provides firms with not only with the database technology needed to store vast amounts of customer data, but also the necessary tools to derive and disseminate actionable intelligence from it (Crosby and Johnson 2001; Greenberg 2001). In addition organizational members have a tremendous impact on the knowledge management process…employees (particularly, boundary spanners) possess substantial amounts of knowledge about individual customers and their needs and preferences (c.f. Alavi and Leidner 2001). The ability to harness such intelligence has been empirically linked to the effectiveness of firms' interaction management efforts (e.g., Zahay and Griffin 2003)." The paper also notes that the interaction management process leverages available intelligence to build and strengthen customer relationships and that it also depends on the technological and human resources of the firm. This dual dependency on both the human resources of the firm and on the CRM technology to "deliver profit-maximising portfolio[s] of customer relationships" (p. 481) highlights the need to consider the relationship and roles of the customer-facing employee.

We also note that there have been calls by CRM researchers for further investigation of employee performance-based evaluation systems, the organisational adoption of customer-focused behaviours for CRM (Campbell 2003), and for CRM training and incentives (Reinartz, Krafft and Hoyer 2004). Such internal marketing issues fall into the purview of agency theory. Agency theory (AT), derived from the economics discipline, is directed at "the ubiquitous agency relationship, in which one party (the principal) delegates work to another (the agent) who performs that work" and looks at the "problems that can occur in agency relationships" (Eisenhardt 1989, p 58).

This has high relevance for CRM management which deals with relationship building deployed by customer-facing employees (Kleinaltenkamp and Jacob 2002), and the use of technology. In these situations the agent has an information advantage as a mediating actor between the firm and the customer. This can create information asymmetries (Lassar and Kerr 1996), and hidden action (opportunistic behaviour that can never be discovered by a principal). Various activities have been developed to try to deal with such behaviour such as screening, signalling and self-selection activities, We note that co-operation on a goal is usually only possible when induced by payment or reward schemes (Spremann 1987).

As CRM researchers have noted (Chen and Popovich 2003; Hansotia 2002; Kotorov 2002; Ling and Yen 2001; Payne and Frow 2004; Pan and Lee 2003; Park and Kim 2003; Ryals and Knox 2001) CRM success conventionally demands a re-engineering of the firm's activities into customer-facing points of contact and the integration of data across the enterprise. It may also require openness in the technology system for interworking across organisational boundaries and for customer interrogation (Milosevic and Lister 1995). Given such openness the actors (agents) can take advantage of private information, behave opportunistically, or take advantage of the actions of others. This can particularly apply when information provision is non-standard and involves significant complexity. Such a situation as can occur in key account managed CRM systems such as call centres, customer care lines or customer complaint centres, partner relationship management systems (PRM), supplier relationship management systems (SRM), and in eCRM deployment (Dyché 2002). Such activities, especially eCRM, require support for the simultaneous existence of information services of highly differentiated types, and imply different performance and quality of service requirements of the agents.[4] They also require a cooperative environment, both culturally and (increasingly) technologically (viz. eCRM and the integration of inter-company processes (Business to Business Integration (B2B-I) (Santema and van de Rijt 2002)) in which the service is provided. The creation of a co-operative environment in which the agent is optimally contracted falls under the aegis of the marketer as it concerns both consumer behaviour and internal marketing process/communication knowledge

Milosevic and Lister (1995) note that resource issues can arise in such an environment. The complexity of response and the individual response behaviour of agents can cause uncertainty in service delivery. This uncertainty can "cause an uneven spread of the benefits of the resources among interacting parties" (p.4). They note that this has economic impact since it is the major element of competitiveness and an important element of the design of contracts (p.4), as well as having technological and utilisation of human resource impacts in the delivery of services. They further suggest that optimal incentives design and optimal contract

[4] The positive impact of eBusiness on the speed of communication processing, the time and cost reduction for order and enquiry cycles, and for heightened levels of responsiveness in service delivery and vendor relationships is now well known (Lancioni, Smith and Oliva 2000).

and mechanism (multiple agent) design (in which the importance of uncertainty on resource allocation is taken into account), as outlined in AT theory, can assist in modelling and rectifying information asymmetries and hidden action as outlined above (p.15).

It is widely recognised that agency problems dominate many economic activities within organisations and across markets, and Milosevic and Lister (1995) argue that these also characterise interactions between agents and users of open distributed systems (ODS). Such ODS are commonly deployed in eBusiness and eCRM implementation. With increasing inter-company systems integration and the resulting opportunities from the use of eBusiness tools for heightened customization, personalization and idiosyncratic customer service solutions the agent's importance as the relationship pivot btween supplier and buyer increases. The increasing autonomy vested in agents to provide such customized e-service solutions could create an environment in which information asymmetry and hidden action might proliferate. AT posits that the opportunistic behaviours of CRM agents which cause hidden action (moral hazard) can be nullified by the use of an incentives mechanism and that AT can optimally model such mechanisms.

Although we have here considered the principal/agent distinction in terms of firm/employee relations the use of AT is commonly applied to the firm (service provider) /customer (service requester) relationship where resource problems emanate from the parties having their own objectives and interacting in the presence of uncertainty and information asymmetry[5]. This has relevance for those sectors which have high technology use and in eBusiness deployment. Information technology invariably impacts the economics of organisations (Schreuder 1992) and the acknowledged reengineering that CRM implementation occasions makes further examination of AT profitable for CRM process and development.

Conclusion

The extended, integrative conceptual model of CRM we present serves as a new starting point for a more complete understanding of the CRM process that incorporates and recognises the importance of the internal market dimension to CRM success. This new, integrated model assists managers in understanding the dual market dimensions of CRM strategy that must be deployed in a successful CRM planning process.

Our discussion of agency theory provides CRM managers with an understanding of the issues involved in control of situations which involve two-way interaction and behavioural uncertainty (Kleinaltenkamp and Jacob 2002), such as CRM knowledge and interaction management processes (Zablah, Bellenger and Johnston 2004) which are intended to build positive customer experiences, and foster trust and long term relationships. Managers will need to familiarise themselves with the strategies of agency management to enable control of, increasingly, disparate and autonomous CRM agents.

Through our discussion of the dual organizational processes central to CRM success, and in our exploration of the role of agency theory in CRM deployment we have illustrated the issues facing CRM managers, and suggested strategies to deal with the dualities of process and relationship in increasingly complex organizations.

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[5] It will be interesting to observe the effects of web-enabled electronic data interchange (EDI) on such information asymmetry, especially when such data exchange may occur via inter-company data integration.

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