
Preface

Welcome to the second edition of **Customer Relationship Management: Concepts and Technologies**.

The book provides a comprehensive and balanced review of Customer Relationship Management. It explains what CRM is, the benefits it delivers, the contexts in which it is used, the technologies that are deployed, and how it can be implemented. It shows how CRM practices and technologies are used to enhance the achievement of marketing, sales and service objectives throughout the customer life-cycle stages of customer acquisition, retention and development, whilst simultaneously supporting broader organizational goals.

The book has been written to meet the demand for an impartial, academically-sound, examination of CRM. It is a learning resource both for students of CRM and for managers wanting a better appreciation of the role that CRM can play in their own organizations.

The first edition was entitled *Customer Relationship Management: Concepts and Tools*. The change to the new subtitle, *Concepts and Technologies*, reflects the requirements of readers. In true customer-oriented manner, we surveyed readers and adopters of the first edition. They said they wanted more on CRM technologies. This book delivers it. However, although there are a number of chapters dedicated to CRM technologies, and technology matters are considered throughout the book, the book puts technology into a managerial context. This is not a book about technologies, but it is about how marketers, salespeople, service staff and their managers can use technologies to better understand and meet the requirements of customers, whilst also meeting organizational goals and objectives. Our survey of readers and adopters also discovered that they wanted more case illustrations and screenshots from CRM software applications. The book delivers them, too.

The book draws on academic and independent research to ensure that it is both theoretically sound and managerially relevant. Research from a wide range of academic disciplines contributes to the book. These include marketing, sales, customer service, human resources,

technology management, strategy, change management, project management, leadership, operations, management accounting, finance and organizational behaviour. Supplementing these academic credentials, the book also makes use of research conducted by independent analysts such as Gartner and Forrester, two organizations that conduct leading-edge, state-of-the-art research into CRM and related areas.

Audience for the book

This book has been written for a number of audiences, all of whom share an interest in improving their understanding of CRM.

- MBA and Masters students, and upper-level undergraduates studying CRM or related advanced courses, such as relationship marketing, database marketing, customer management, sales management, key account management, strategic management, customer value management and customer service management.
- Those pursuing professional qualifications or accreditation in marketing through international organizations, such as the Chartered Institute of Marketing and the Institute of Direct Marketing, or national bodies such as the Marketing Institute of Ireland or the Canadian Institute of Marketing.
- Senior and mid-level managers who are involved in CRM programmes and system implementations, whether in a marketing department, the sales-force or the service centre.
- Students pursuing professional qualifications or accreditation in sales management or key account management through international organizations such as the Institute of Sales and Marketing Management or the Association of International Marketing.
- CRM users who want a better understanding of this complex area. CRM tools are deployed across the customer-facing parts of organizations. Users includes sales representatives, account managers, marketing managers, market analysts, campaign managers, market managers, customer relationship managers and customer service managers. These users are exposed to just a fragment of the CRM universe. This book can put their role into broader context.

Key features of the book

- The book provides a helicopter view, an overview, of the domain of CRM. As an impartial review of the field, it is not tied to any particular perspective on CRM. Indeed, the book identifies a number of holistic models that provide different and competing overviews of CRM.
- Although CRM is in widespread use, there is still some misunderstanding about what CRM is. The book identifies four different types of CRM: strategic, operational, analytical and collaborative.

Several chapters are dedicated to strategic CRM and others focus on operational CRM, whereas analytical CRM and collaborative CRM issues are addressed throughout the book.

- The book defines CRM as the core business strategy that integrates internal processes and functions, and external networks, to create and deliver value to targeted customers at a profit. CRM is grounded on high quality customer-related data and enabled by information technology. This definition serves as a central point-of-reference throughout the book.
- The book emphasizes a managerial perspective on CRM. Although there is plenty of content on technology, it is not a book about technology *per se*. The technology content of the book has been written so that readers who are unfamiliar with technology, or who are technophobes, can still understand what CRM technologies can deliver. Technology is secondary to management throughout the book. You don't need a degree in information systems to benefit from the book!
- The book has a strong academic foundation provided by research from a number of disciplines.
- The book contains many examples of CRM technologies and their application to marketing, selling or service functions. Screenshots are a feature of the book.
- Every chapter contains case illustrations. These are not problem-based cases, but examples of CRM in practice so that readers can come to appreciate how CRM is deployed.
- All chapters follow a common format: learning objectives, text, case illustrations, summary and references.

Improvements over the first edition

There are a number of important improvements to this edition which have been made largely as a result of input from readers and adopters.

The book is significantly expanded. At seventeen chapters, this edition is seven chapters longer than the first edition. There are three new chapters dedicated to operational CRM applications: sales-force automation, marketing automation and service automation. The chapters define important terms, identify the main vendors and actors, and set out the benefits users can expect to experience and the functionality that is available. There is a new chapter entitled 'Understanding relationships'. If CRM is about developing and maintaining relationships with customers, it is important to have clear understanding of what a relationship looks like, and how, if at all, it can be managed. This chapter defines the term 'relationship', examines whether customers want relationships with suppliers and *vice versa*, identifies attributes of successful relationships and reviews five different schools of thought that have influenced relationship management in a business context.

There is a new chapter on planning and implementing CRM projects. This takes readers through a disciplined five-stage process designed to promote successful CRM outcomes. There is a new chapter on 'Customer experience'. Customer experience has become something of a buzzword in the last few years. This chapter explores the concept of customer experience, and addresses the question of whether CRM can or does enhance customer experience.

Many new case illustrations have been added to every chapter, and all other content has been revised and updated. An added feature of this edition is the inclusion of a large number screenshots from CRM software applications. This is designed to give readers a sense of the CRM user's experience.

A final enhancement to this edition is the provision of an array of enriching online content, which is described below.

Additional online resources

Readers and adopters of the first edition said they wanted additional online resources to be available. There are now two websites linked to the book, designed to enrich the learning experience.

The website for **adopters** provides a range of pedagogical resources for instructors. Accessed by password and only available to authorized instructors, the site contains a full set of PowerPoint files; details of case studies that can be used as a basis for classroom discussion or student assignments; links to technology companies' websites where CRM technologies are demonstrated, and white papers and case histories can be viewed; links on online CRM communities and links to analysts websites where up-to-date CRM-related research is published. The adopters' website also includes a list of discussion topics, exercises, projects and assignments that engage students and promote deeper, more meaningful, learning.

The website for **readers** provides access to a range of value-adding content including chapter-by-chapter learning objectives; links to technology companies' websites where CRM technologies are demonstrated, and white papers and case histories can be viewed; links to online CRM communities; and links to analysts websites where up-to-date CRM-related research is published.

I hope you enjoy the book and find it a satisfying read. Writing a book is a little like painting a picture, or tending a garden. You never reach a point where you can safely say that the job is finished. There is always more that you can do. With that in mind, I invite you to write to me at francis@buttleassociates.com. I look forward to hearing from you.

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