

Empirical Research for the Development of Effective CRM

Implementation Model:

Constraints Solving Approach

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Empirical Research for the Development of Effective CRM Implementation Model: Constraints Solving Approach

Abstract

In the Japanese market today, many firms face three conditions: commoditized market, mature market, and down stream orientation in the value chain. In the first section, we summarize what firms need to respond to in a commoditized, mature and downstream oriented market. In the second section, we review the definition of CRM and how it makes a profit to the firms. The third section, we show what disturbs a firm's full use of CRM by theoretical and empirical approaches. The fourth section shows a step-by-step flow chart of our research approach. We identify actual barriers for implementation of CRM by quantitative approach based on the questionnaire surveys in the fifth section. We then propose an empirically supported model and demonstrate our model using case studies in the sixth and the seventh section. We conclude our paper after proposing an effective CRM Implementing Model in the last section.

Keywords: CRM, Effective model, Actual barriers, Empirical approach

Word Count: 8799 words

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Introduction

In the Japanese market today, most firms face three conditions; commoditized market, mature market, and downstream orientation in the value chain. As we describe in this research paper, firms facing these issues are required to provide an experiential value to their customers, and have a strategy for existing customers retention and customer responsiveness to gain a competitive advantage among their rival firms. As a tool to solve these situations, CRM (Customer Relationship Management) has been raised as one of the best solutions for firms. CRM became well known all over the world from 1990s from the U.S., and started to be implemented in many firms around the world.

However, there are only a few firms that could achieve significant improvements on marketing-related performance by using CRM. Moreover, there has been no research on practical development and the way of maintaining an effective CRM model, even though many scholars have proposed many barriers that would limit a firms' full use of CRM. Therefore, we encourage firms to fully implement CRM by pointing out its barriers and creating a practical model based on empirical approach.

In the first section, we summarize what firms need to respond to in a commoditized, mature and downstream oriented market. In the second section, we review the definition of CRM and how it makes a profit to the firms. The third section, we show what disturbs a firm's full use of CRM by theoretical and empirical approaches. The fourth section shows a step-by-step flow chart of our research approach. We identify actual barriers for implementation of CRM by a quantitative approach based on questionnaire surveys in the fifth section. We then propose an empirically supported model and demonstrate our model using case studies in the sixth and seventh sections. We conclude our paper after proposing an effective CRM Implementing Model in the last section.

1. Crisis in Marketing: Theoretical Background

In the Japanese market today, many firms are facing various problems. In this section, we review the present status of Japanese market by looking at previous research and raise three major conditions that most firms are struggling with. The first two conditions are commoditization and market maturation, which are the conditions

many firms fall into. The last one is an increasing of attention toward downstream orientation in the value chain where many firms belong.

1-1 Commoditization in Market

According to the previous research by scholars majoring in marketing, most products and services in today's market have been transformed for commoditizing, and it is becoming more difficult for firms to invent innovative products than before. For example, packaged consumer products section such as foods and beverages, industrial goods section such as jet engines and inverters, and even service section such as logistics and consulting firms may be considered as commoditized markets (Onzo 2006). Ogawa (2011) defines that commoditization is to fall into the market which has no difference except for the price among rival goods/services or in which there are almost same goods/services for consumers. Consumers tend to make a purchase depending on the price, if a market is commoditized. Furthermore commoditization caused a high possibility of getting involved in a price war, which impacts on a firm's profitability (Ikeo et al. 2010). Onzo (2000) claims that it becomes difficult for firms to attain

economical values (Functional benefits) from goods/services when the market is commoditized, therefore, to escape from the commoditized market, firms need to provide experiential value to customers. Firms can be differentiated from rival firms because experiential value varies from customer to customer. Therefore, there is still great opportunity to create new goods/services from this experiential point of view. Thus, Onzo (2000) emphasizes the importance of the strategy based on experiential value. Several researchers claimed that the factors of experiential value mostly consist of customer relationships, therefore, firms need to create customer relationships in order to serve experiential value (Hirashiki 2007 and Aoki 2011).

1-2 Market Maturation

Most markets today, such as automobiles, electronics, construction, chemistry, and financial markets, are generally mature (Murayama et al. 1999). Ishii et al. (2004) explain that market maturation has two meanings: competition problem and change of demands. Regarding problems of competition, once a market becomes mature, and gets difficult to acquire new customers, stealing customers from rival firms is the only way

to grow. Regarding change of demands, during the period of market maturation, the biggest demand from customers is replacement. As buyers in this period have already got used to the firm's goods/services, the buyers want reasonable merit to switch to new good/service from what they've already got used to. Thus, Ishii (2004) claims that marketing costs for getting new customers increases because of these two consequences of market maturation, and that the firms should focus on having relationships with existing customers rather than getting new customers. Moreover, he indicates that, to keep the firm's existing customers, the firms should have management of customer relationships by distinguishing and keeping their loyal customers.

1-3 Competitiveness in Downstream Activity on Value Chain

Usui (2006) mentions that there are two types of orientations depending on where a firms' main value is added in their value chain activities advocated by Porter (1985).

The first one is an upstream orientation including product development and technological innovation activities. The second one is a downstream activity such as sales/marketing and after-service, which are required customer related marketing. He also defines a "strategically meaningful resource" as a main successful factor or a

resource that brings an advantage to a firm in a competitive market. He treats a technological innovation as a strategically meaningful resource in the upstream oriented marketing, while customer responsiveness as the one in downstream oriented marketing. Day (1990) also mentions the importance of customer responsiveness in the customer-oriented market. Regarding customer responsiveness, Regis McKenna (1991) advocates that ICT enables firms to have responsiveness to customers' needs, to create a program, and to realize customized supports to their customers. Therefore, in the downstream oriented marketing, firms need to develop and maintain an effective ICT system to manage and grasp their major customers at all times for improving their skills to serve customers, and to respond the customers' needs in appropriate ways.

As we described above, most firms in Japan now face these three conditions. The firms can never avoid excessive competition, and it has become difficult for the firms to create competitive advantages if they continue on the same path. From the next section, we introduce the concept of CRM as a strategic tool to create competitive advantages for the firms in these conditions and explain the factors of it.

2. CRM as a Strategic Tool

CRM is proposed as a tool to break through the conditions we mentioned in the last section. CRM is now widely accepted all over the world. In this section, we review the rise and definition of CRM, and show how it affects firm's marketing activity in a better way.

2-1 The Rise of CRM

The term relationship marketing firstly introduced by Leonard L. Berry in 1983 as “attracting, maintaining, and—in multi-service organizations— enhancing customer relationships” (p.25). He stressed the importance of relationship marketing in the context of service industry. After that, several perspectives emerged in the field of relationship marketing study such as the Nordic school, the IMP and the U.K. perspectives in 1970s-2000s. Parvatiyar and Sheth (2000) tried to conceptualize the discipline of relationship marketing by integrating these perspective in their book “Handbook of Relationship Marketing.” In parallel with these developments, the concept of CRM emerged as a practical method of relationship marketing thanks to a development of ICT (Minami 2005). The term CRM (Customer Relationship

Management) emerged in the late 1990s in the U.S., although the first use of the term CRM is not identified or discussed within the academic literature (Payne and Frow 2013). In Japan, CRM came to be known within the ICT market in the middle of 1990s, and its concept started to spread throughout Japan, mainly used by consulting firms by the late 1990s (Minami 2006).

2-2 The Definition of CRM

Kondo (2008) states that CRM covers a wide range; from one which focuses on the ICT as a tool for creating and maintaining customer relationships to another which is understood as a global action of customer relationships for improving shareholder value.

The ambiguity of CRM depends on various awareness's of the issues by different researchers; therefore, its definition is not mutually exclusive and should not be converged. This means that no one common definition of CRM exists at this moment.

Therefore, we surveyed some representative definitions from previous studies as follows: (Figure 1):

Figure 1. Representative definition from previous studies

Researchers	Year	Definition
Day and Van den Bulte	2002	“CRM is a cross-functional process for achieving a continuing dialogue with customers, across all their contact and access points, with personalized treatment of the most valuable customers, to increase customer retention and the effectiveness of marketing initiatives.” (p.5)
Parvatiyar and Sheth	2001	“Customer Relationship Management is a comprehensive strategy and process of acquiring, retaining, and partnering with selective customers to create superior value for the company and the customer.” (p.5)
Reinartz, Krafft, and Hoyer	2004	“It is in the process of customer relationship management to manage for eliminate and the start and maintenance of customer relationship across all contact points with customers.” (p.294-295)
Hobby	1999	“Management approach organizations to identify them by managing customer relations, attract, improve customer relation profitable.” (p.28)
Kotler and Armstrong	2014	“It is in the overall process of building and maintaining customer relationships that generate profits by providing a satisfaction and superior customer value.” (Translated from Japanese, p.14)
Payne and Frow	2005	“CRM is a strategic approach that is concerned with creating improved shareholder value through the development of appropriate relationships with key customers and customer segments.” (p.168)

By screening these definitions, we divide keywords in each study into five categories:

Strategy, Target, Purpose, Range, and Method.

Strategy: “cross-functional process,” “comprehensive strategy,” “overall process,”

“strategic approach”

Target: “valuable customers”, “selective customers”, “key customers”

Purpose: “to manage customer retention”, “to make effectiveness of marketing

initiatives”, “to create superior value for the company and the customer”, “to

improve profitable customer relationships”, “to improve shareholder value”,

“to have appropriative relationships”

Range: “eliminate and start”, “building and maintaining”

Method: “dialogue with customers”, “all their contacts and access points”,

“by using IT”

Based on these keywords above, we define CRM as a general strategy which identifies and screens firm’s customers by using IT, manages building, keeping, growing and breaking the customer relationship, and provides customer value and customer satisfaction.

2-3 The Factors of CRM

In order to break through the three conditions we mentioned in the first section, we claim that CRM is one of the best solutions for today's markets. The reason why we consider CRM as such is attributed to the factors of CRM. In this section, we point out two factors of CRM that would improve firms' performance and even the firms that face the three market conditions that we described in the previous section.

Factor 1: Creating and managing customer relationships

Minami (2005) mentions that CRM enables firms to create relationship with customers by storing and using customer data from various contact points.

As for managing customer relationships, Parvatiyar and Sheth (2001:p5) state that "CRM is a comprehensive strategy and process of acquiring, retaining, and partnering with selective customers to create superior value for the company and the customer," and explain that CRM enables firms to distinguish their loyal customers and keep customer relationships.

Minami (2005) shows that CRM implementation leads to customer retention, by

referring to two research papers: Mithas, Krishnan, and Fornell (2005) and Gustafsson, Johnson, and Roos (2005). Mithas et al. (2005) validate benefits of CRM application to customer satisfaction and capture a role of customers' knowledge as a mediation mechanism. In this research, three reasons are raised to show why CRM application leads to customer satisfaction. First, CRM applications enable firms to customize their offerings for each customer. Customized offerings enhance the perceived quality of products and services from customers' viewpoints. Second, in addition to enhancing the perceived quality of the offering, CRM applications also enable firms to improve the reliability of consumption experiences by facilitating the timely, accurate processing of customer orders and requests and the ongoing management of customer accounts. Third, CRM applications also help firms manage customer relationships more effectively across every stage of relationship initiation, maintenance, and termination.

Gustafsson, Johnson, and Roos (2005) validate satisfaction-retention relationships by conducting qualitative interviews and a periodic survey.

Factor 2: Achieving higher customer responsiveness

In the previous section, we have mentioned that firms need to enhance customer responsiveness in downstream activities, and that ICT enables firms to support it. CRM is a tool to realize customer responsiveness by using ICT. Specifically, its implementation enhances customer responsiveness for customized goods/services/communications by creating and using the database of customers' information (Minami 2005).

As we have explained above, firms can have long-term competitive advantages and break through the market conditions mentioned in the first section by applying CRM as a strategic tool.

3 The Present Issues and Barriers of CRM Implementation

Although CRM has the factors to improve the firm's conditions as we have shown so far, there are a lot of barriers which disturb firms' full use of CRM. Several researches showed low rates of CRM successful implementation (Figure 2).

Figure 2. Actual status of CRM Implementation

Company	Actual condition survey
CSO insights	It was shown that only 25% of Japanese companies which are implementing CRM could answer that they could achieved significant improvement in their performance.
Insight Technology Group	'69% of CRM projects have little impact to sales performance'
The CRM Institute	Companies think that their CRM projects are significantly less successful than their consultants or suppliers'
Giga	'70% of CRM initiatives will fail over the next 18 months'
Gartner	'60% of CRM projects end in failure'

Cited from: Payne and Frow (2013) "Strategic Customer Management Integrating Relationship Marketing and CRM." CAMBRIDGE UNIVERSITY PRESS

In this section, we review five barriers which disturb a firm's full use of CRM pointed out in the previous studies, and demonstrate them by an interview survey conducted with four companies which have implemented CRM. Next, we raise six barriers newly proposed in our current study that are proved to exist by an empirical approach. Finally, we indicate the limit of present CRM study.

3-1 The Barriers of CRM Implementation: Literature Review

First, we review five barriers from previous studies as follows;

Barrier 1: Gaps between top management and front line workers

According to Davenport (2000), top managements' biggest misunderstanding regarding introducing ICT is that they think front line workers also desire ICT. Although he mentions ICT, CRM would lead to the same problem. Hurubayashi (2003) indicates the fact that front line workers do not use CRM system seriously because of a complexity and an opaque purpose of CRM. Saito (2011) also mentions the same barrier, and indicates this barrier would cause failures to firms.

Barrier 2: Introducing CRM without setting a specific goal

According to Rigby et al. (2002), many CRM vendors do just claiming that they will automate the delicate and mysterious process of repelling low-margin customers and luring high-margin ones, and that makes many firms introduce CRM without any specific marketing goals. They also indicate that most executives still mistakenly regard CRM technology as a marketing strategy. Hurubayashi (2003) also indicates about the same barrier that firms tend to focus on only creating databases as their purposes.

Barrier 3: Development of organizational structures for effective implementation

Rigby et al. (2002) mention that a CRM implementing firms need to first revamp the key business processes that relate to customers. Having a strategy is not enough. A CRM strategy rollout will be successful only after the organization and its processes—job descriptions, performance measures, compensation systems, training programs, and so on—have been restructured in order to better fit customers' needs.

Nagahara (2003) claims that firms need to reconstruct their organization for effective implementations of CRM.

Barrier 4: Difficulty to collect and analyze valuable data

According to Sugawara (2004), CRM implementing firms have segmented their customers by "demographically characteristic data" such as age, gender, and annual income, and "RFM analysis" which uses customers' purchase histories. The problem here is that firms focus on gathering and using data too much. Therefore, firms tend to overlook "what data they really need," and they cannot segment customers with appropriate data.

Barrier 5: Dissatisfying customers by over-managing their data

According to Rigby et al. (2002), customers' needs can vary depending on what a firm is like and what kinds of relationships the firm and its customers want to have with one another. Such relationships can vary across industries, across companies in an industry, and across customers in a company. Unfortunately, managers fail to consider these issues when they use CRM, which leads to disastrous consequences. They often end up trying to build relationships with wrong customers or trying to build relationships with right customers in the wrong way.

3-2 Explorative Case Studies of 5 firms for Assessing the Barriers

We consider that reviewing previous studies are not enough to define the barriers because of the lack of an empirical approach and the oldness of those previous studies. Therefore, we conduct case studies with five firms by the form of interview surveys. The reason why we choose case studies is depending on Robert Yin (2008); "Case studies are the preferred method when (a) "how" or "why" questions are being posed, (b) the investigator has little control over an event, and (c) the focus in on a contemporary

phenomenon within a real-life content.” We choose target firms randomly from CRM

yearbook 2006-2010. The result of our case studies is given below (Figure 3).

Figure 3. The result of assessing the barriers

Firm' name	Firm A	Firm B	Firm C	Firm D	Firm E (CRM vendor)
Industry	Pharmaceutical	Financial	Financial	Retail	Consulting
Employees (people)	About 200	About 1500	About 5000	About 200	About 500
Sales (yen)	About 13 billion	About 70 billion	About 300 billion	About 15 billion	About 230 billion (globally)
Date and time	30-Jul 19:00~20:30	4-Aug 14:00~15:30	13-Aug 13:30~15:00	4-Sep 11:30~13:00	8-Aug 18:00~19:00
Interviewer	The person in charge of CRM from the direct marketing department.	The person in charge of CRM from the marketing department.	The head of the marketing department & The person in charge of CRM from the marketing department.	The person in charge of CRM from the planning department.	The person in charge of CRM of department stores.

<p>1. Gaps between top management and front line workers.</p>	<p>We had this problem before.</p> <p>We also have gaps among departments.</p>	<p>We have this problem. CRM would deny conventional style of sales department's business operation.</p> <p>We have gaps among departments.</p>	<p>We had it but not any more.</p>	<p>No problem at all.</p>	<p>It is crucial barrier many company would have.</p>
<p>2. Introducing CRM without setting a specific goal.</p>	<p>We did not have this problem. It would be a problem in the introducing phase.</p>	<p>It generally existed before 2000s among most companies. But not any more.</p>	<p>We need CRM in our industry. So we had a clear goal.</p>	<p>No problem at all.</p>	<p>Firm can never success without goals.</p>
<p>3. Development of organizational structure for effective implementations.</p>	<p>We have this problem. The persons who can treat data are crucial, and it is ideal that each department has CRM professional.</p>	<p>We have this problem. A cross-functional system and a consideration to sales department are crucial.</p>	<p>We had been doing our business in the same way with papers before, so no problem.</p>	<p>It is very important to share data throughout the firm.</p>	<p>To put a department that encourages CRM and to share data from there are important.</p>
<p>4. Difficulty to collect and analyze valuable</p>	<p>We had this problem when we introduced</p>	<p>Not any more since 2000s.</p>	<p>Collecting data and segmenting</p>	<p>It is difficult because a few people</p>	<p>It is just a barrier of trial and</p>

data.	CRM.		in every factor are crucial.	can do it.	error.
5. Dissatisfying customers by over-managing their data.	No problem at all.	We had this problem.	We had it.	We had it.	One of the big problems.

Based on this matrix of our case studies, we extracted the common facts in each code as below.

Code 1: Common fact of Barrier 1

(1) It is not only the barrier between the top management and front line workers, but also the barrier among departments.

Code 2 Common fact of barrier 3

(1) Development of an organizational structure for effective implementation is the barrier of developing an organizational structure for sharing the information throughout the organization.

Code 3 Common facts of all barriers

(1) The barriers are abstract, and many firms might misinterpret the meaning of the barriers.

Finally, combining those theoretical and empirical approaches, we raise six new barriers that many firms would face when implementing CRM, which are summarized below (Figure 4):

Figure 4. The six new barriers

Barrier 1	“A decline in the motivation of front-line workers by the change of the business operations.”
Barrier 2	“Other departments don't make use of the customer's information which is already collected and analyzed by CRM.”
Barrier 3	“A misunderstanding that firms think CRM as an almighty tool is spreading throughout the organization.”
Barrier 4	“The organizational system has not been arranged for integrating and sharing information.”
Barrier 5	“Required information can not be extracted because of a difficulty of customer segmentation based on CRM data.”
Barrier 6	“An increase in costs and away from the customer due to excessive approach to the customer.”

In this chapter, we showed the actual barriers in implementing CRM with comparative analysis from case studies. In the next chapter, we show an increase in the importance of CRM in the actual Japanese market, and review the limit of present studies of CRM.

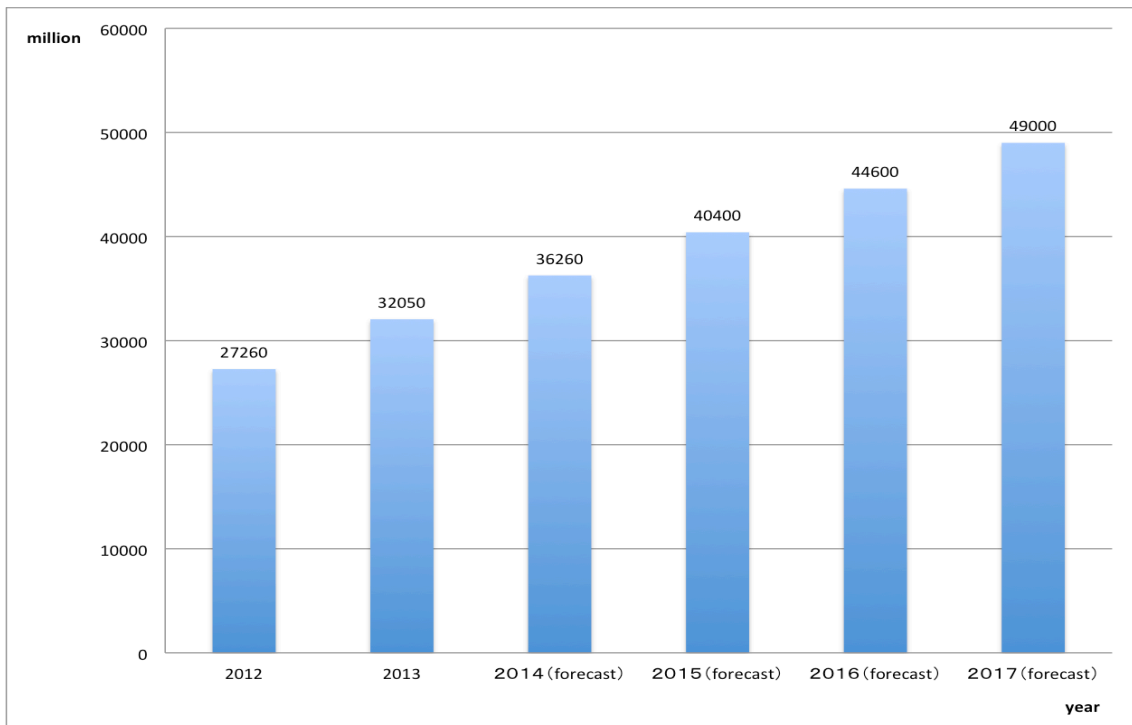
3-3 The Market Scale and Limit of The Present Studies of CRM

In the field of CRM study today, although it is advocated and demonstrated by many researchers that CRM is an effective approach, there is no practical model with

empirical approaches. For example, although Minami (2006) proposed that the integration and use of firms' information through CRM implementation generate the benefit for the firms, it is not shown that how the firms should integrate the information and take CRM process into their business models. Moreover, Rigby et al. (2002) demonstrate the four barriers that lead firms into failure of CRM implementation and introduce one successful example in each barrier, however, the universalized model that firms can easily introduce lacked in their study.

According to the research done by Yano Research Institute in 2014⁽¹⁾, the market scale of CRM package license is becoming bigger (Figure 5) thanks to the development of ICT such as Big data.

Figure 5. The transition of market scale of CRM package license



Although the market scale of CRM is becoming bigger, the study of CRM has been not focused among the researchers recently and it is still not established as we described above. We consider that the effective CRM implementation model based on an empirical approach should be constructed to make CRM study closer to perfect.

Moreover, we believe that if a model would be introduced, a firm would be encouraged to make a full use of CRM. Therefore, we make a model to encourage the firms where CRM has been introduced to make full uses of their CRM strategy.

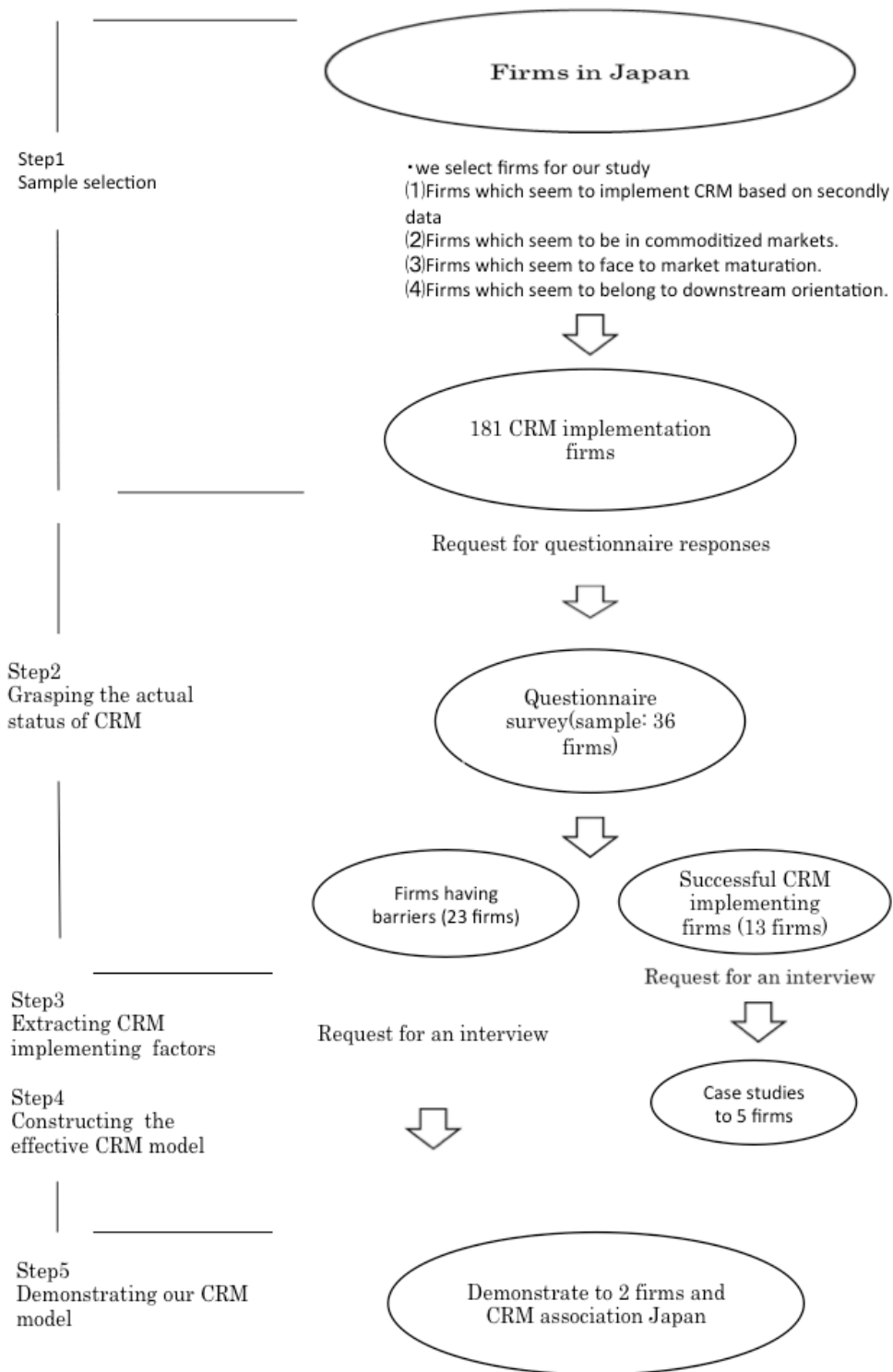
4. A Research Flow for Development of the Effective CRM Model

As we outlined in the preceding chapter, theories about CRM are ambiguous and strictly conceptual as current theories and studies lack empirical research. Therefore, we construct our model based on an inductively empirical approach.

4-1.The Flow of Our Study

We constructed the flow of our study is as follows. The first step is to select firms for our study. The second step is to conduct a questionnaire based survey with the firms to understand the actual barriers each firm has and for selecting successfully CRM implementing firms. The third step is to extract successful factors from the successfully CRM implementing firms by interview and mail survey. The fourth step is to construct the model based on the successful factors mentioned above that we analyze later. The fifth step is that we demonstrate our model with an interview survey to CRM implementing firms and CRM ASSOCIATION JAPAN. (Figure 6)

Figure 6. The flow of our study



4-2 Identifying 181 CRM Implementing Firms in Japan

The purpose of our research is to introduce the effective CRM implementation to the firms with problems in implementing CRM although CRM is important for their marketing activities. Therefore, we narrow down our target by concentrating on three conditions we raised in the first section: the commoditized market, market maturation, and downstream oriented market. Thus, we identify subjects of our study following the four criteria below.

- (1) Firms which seem to implement CRM based on secondly data.
- (2) Firms which seem to be in commoditized markets.
- (3) Firms which seem to face to market maturation.
- (4) Firms which seem to belong to downstream orientation.

We used secondary data, found in Attachment 1, to identify firms that appear to implement CRM solutions. We then applied conditions 2, 3 and 4 to narrow the target list to the most appropriate firms. In order to obtain a sufficient number of targets we also included companies that fell into a “gray zone”; firms that do not, immediately, appear to meet all four criteria, but could.

Through applying the four criteria and allowing for a flexibility within the criteria we created a target list of 181 firms. In order to facilitate our study we approached all 181 firms with our questionnaire and received responses from 33. Of those 33 firms that responded, we identified 12 that appeared to be successfully implementing CRM and asked for their cooperation in an interview.

Four of the firms responded to our requested positively. One further firm responded positively; they did not agree to an interview, but did agree to a correspondence by mail. At the conclusion of our study we presented our CRM model to two firms from our target list that are experiencing difficulties in implementing CRM and to the CRM ASSOCIATION JAPAN.

5. A Questionnaire Survey to 181 CRM Implementing firms in Japan

In this section, we describe the purpose and the result of our questionnaire survey

we offered to the 181 firms that adapt four criteria given in the last section. Next, we grasp the actual barriers the firms have, and select the firms that have no problems in implementing CRM to conduct case study by interview survey.

5-1 The objective and Method of Our Questionnaire Survey

Although many previous studies revealed the barriers of CRM implementation, it is still controversial as to 'how many firms have which barriers' in the actual situation. Therefore, we ask which barriers the firms actually have to 181 firms that adapt the four criteria, by using the form of questionnaire survey, and reveal the actual status of CRM implementing firms quantitatively. In doing so, we select the firms that have no problems in implementing CRM to extract successful factors.

The method of our quantitative research consists of four steps. The first step is to ask the firms about whether they presently have problems in each barrier or not, or whether they previously did to grasp how many firms have or had the problems of the barriers of CRM implementation. The second step is to ask the firms which has/had the problems to grade the score of each barrier we described before by four grades; 'problem', 'little problem', 'less problem', and 'no problem' in order to know which problems are the

ones many firms have/had. The third step is to compile the score and grasp how many firms have/had the problems and the distribution of problem in each barrier. The last step is to select the firms that have no problems in order to conduct interview survey.

The way we compile is to score the four grades as:

Yes, we have a Problem - 3 points

Little problem existing- 2 points

Less problem existing- 1 points

No problem at all - 0 points.

From this scoring, we grasp the actual status in two ways. The first one is to score the total points of all firms in each barrier in order to reveal the distribution of greatness of each barrier. The second is to score the points in each firm in order to grasp the actual rate of the effective use of CRM from 0 to 18 points and to identify the firms that have 0 points as the successful CRM implementing firms.

5-2 Scoring of The Barriers of CRM Implementation

As a result of our questionnaire survey, we could receive answers from 36 firms. The

recovery rate is 19.9%. We compile the result as below (Figure 7&8):

Figure 7: The actual rate of effective use of CRM

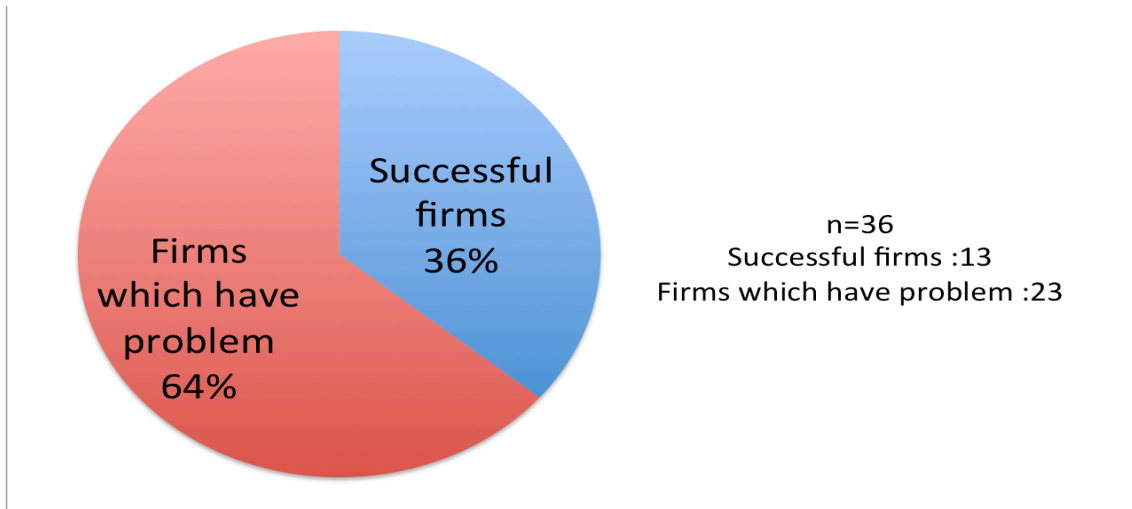
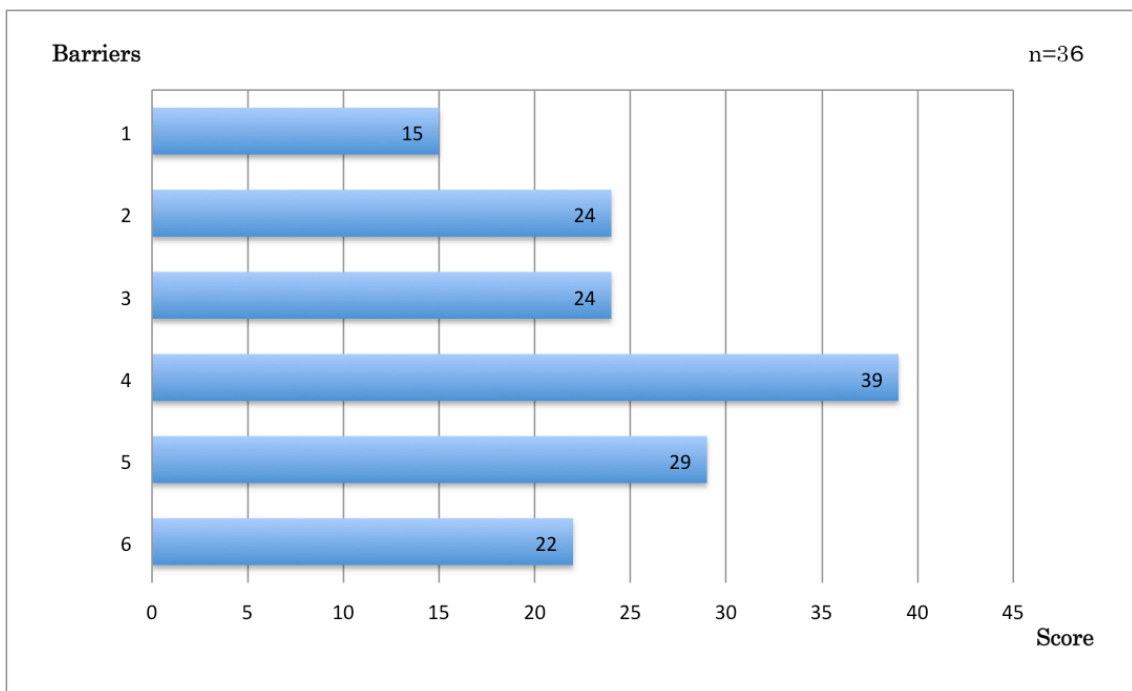


Figure 8: The greatness of the barriers



The results of this survey are as follows:

- (1) 36% of the firms have presently no problems in CRM implementation.

- (2) 64% of the firms still have problems in CRM implementation.
- (3) Top barrier is Barrier 4: “The organizational system has not been arranged for integrating and sharing information” (Score=39), The second one is Barrier 5 “Required information can’t be extracted because of a difficulty of customer segmentation based on CRM data” (Score=29). The third ones are Barrier 2: “Other departments do not make use of the customer's information which is already collected and analyzed by CRM” and Barrier 3 “A misunderstanding that firms think CRM as an almighty tool is spreading throughout the organization” (Score=24).

In this section, we have quantitatively investigated the actual status of CRM implementation by conducting the questionnaire survey. In the next section, we extract the successful CRM implementing factors by examining the results of a case study with the 5 firms that have no problems in implementing CRM.

At the beginning, we planned to select successfully CRM implementing firms by calculating the rate of increasing customer’s LTV (Life Time Value) which consists of three indexes; average frequency of purchasing, average purchasing duration, and

average sales per customer, as well as the question about the barriers above. The purpose of this calculation is to choose successful firms objectively by using numeral data regarding actual effectiveness of CRM. However, after we tried conducting our questionnaire survey to some of our sample firms, we could not get any answer at all and the main reason was it was very hard to gather this kind of confidential information from firms. Our original purpose of this questionnaire was to select the firms that have no problems in implementing CRM. Thus, in order to secure our amount of sample, we stopped asking about the LTV score.

6. Five Case Studies on Successful CRM Implementers: Identifying Its Success Factors

In the previous section, we revealed the actual status of CRM implementation, and selected 13 firms as the successful firms. In this section, we report on the case studies conducted with the successful firms by interviewing, and we extract the successful factors which the firms implemented.

6-1 Conducting Case Studies by Interview Survey

The purpose of the case study is to extract successful factors which successful firms actually implemented. Therefore, we ask the firms how these firms have implemented CRM over the barriers, by the form of interview survey. We offered an interview survey to the 13 successful firms that we mentioned in the last section, and eventually got interviewing data from 4 firms and 1 mail survey.

6-2 Extracting Successful Factors

We scored factors by the number of the firms that had implemented the factors. The result of our case studies is given below (Figure 9):

Figure 9. The result of case studies with 5 successful firms

Firm's name	Firm C	Firm D	Firm F	Firm G	Firm H
Industry	Financial	Retail	Retail	Real estate	Financial
Employees (people)	About 5000	About 200	About 10000	About 1000	About 300
Sales (Yen)	About 3000 billion	About 145 billion	About 9050 billion	About 375 billion	About 44 billion
Date and time	20-Oct	14-Oct	20-Oct 14:00~14:30	15-Oct 16:00~17:00	Mail survey
Interviewee	The head department of marketing & The person in charge of CRM from marketing department	The person in charge of CRM from the planning department.	The person in charge of CRM from the head department of sales planning.	Assistant head of the general affairs department	The person from Public relations office
(1)A decline in the motivation of front-line workers by the change of the business operations.	We routinized CRM activity gradually as a part of business operations, and checked whether front-line workers use CRM system or not. We got feedbacks from them about the system and improved it. Every employee could share his successful experiences through the activity.	All employees understood our customer centric philosophy from the beginning.	We regularly hold seminar for our employees to enlighten them to use CRM activity and reviewed our evaluation system.	We got feedbacks from front-line workers about CRM system and improved it for them.	All employees had the way of customer centric thinking.

<p>(2)Other departments don't make use of the customer's information already collected and analyzed by CRM.</p>	<p>We distributed CRM system throughout the organization to share information and communicate with each other.</p>	<p>We hold monthly meetings to share information. Also, we hold special meetings twice in a week for analysis department.</p>	<p>We defined CRM system as the tool to recognize customers throughout the organization.</p>	<p>We hold meetings regularly to share the information analysis department analyzed.</p>	<p>All employees recognized the importance of customer information .</p>
<p>(3)A misunderstanding that firms think CRM as an almighty tool is spread throughout the organization .</p>	<p>We set our goal step by step and review it periodically.</p>	<p>We originally had a customer based goal before introducing CRM.</p>	<p>We regularly review a purpose and goal of CRM activity.</p>	<p>We set a quick response to our customers as a goal of CRM activity.</p>	<p>Nothing special.</p>
<p>(4)The organization system has not been arranged for integrating</p>	<p>We integrate our information at the head quarter and share it throughout the organization. Every one can communicate each</p>	<p>We hold monthly meetings to share information.</p>	<p>All employees can use the basic CRM system, check and</p>	<p>Everyone can check and edit the CRM system though</p>	<p>We put the analysis department that could treat customer</p>

and sharing information.	other through CRM system.	Also, we hold special meetings twice in a week for analysis department.	edit information.	some parts are limited.	information and share it through CRM system.
(5)Required information can not be extracted because of a difficulty of customer segmentation based on CRM data.	We segment our customer not only by the loyalty of customers but also by the characters of the customers.	Analysis department is in charge of sending promotions to our customers to secure the suitable approaches. We hold interview surveys monthly to our loyal customers.	We customized CRM system into two ways: for easy use for front-line workers and for professional use for analysis experts to get and analyze information effectively.	Nothing special.	We increased a volume of customer information and deeply distinguish each customer.

<p>(6)An increase in costs and customer defection due to excessive approach to the customers.</p>	<p>We approach our customer only when we detect the change of the customer's behavior.</p>	<p>We consider whether our approach is matched to customers' needs on the daily basis.</p>	<p>We send direct mails according to a purchase history.</p>	<p>Nothing special.</p>	<p>We can approach to our customer thanks to an improvement of accuracy of data analyzing.</p>
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Based on this matrix of our case studies, we extracted the common successful facts in each code as below.

Code 1: The measures for barrier 1 “a decline in the motivation of front-line workers by the change of the business operations.”

- ①A gradual reutilization of CRM activity.
- ②To share the successful experience throughout the employees.
- ③Employee enlightenment.
- ④Getting feedback from front line workers & Improving CRM system.

Code 2: The measures for barrier 2 “other departments don't make use of the

customer's information already collected and analyzed by CRM.”

①Regular meeting for CRM implementation by the head of every department.

②Equal department distribution.

Code 3:The measure for barrier 3 “A misunderstanding that firms think CRM as an

almighty tool is spread throughout the organization.”

①Periodic goal setting review.

Code4: The measures for barrier 4 “the organization system has not been arranged for

integrating and sharing information.”

①System distribution for enabling every employee to access and edit.

②Regular meeting for sharing information between & within departments.

Code 5: The measures for barrier 5 “required information can not be extracted because

of a difficulty of customer segmentation based on CRM data.”

①Employee training.

②Customer segmentation from various perspective.

Code 6: The measure for barrier 6 “An increase in costs and customer defection due to

excessive approach to the customers.”

① Approach adapted for the change of customer behavior.

Next, we explain each successful factor we mentioned above as follow.

Barrier 1: A decline in the motivation of front line workers by the change of
the business operations.

The first one, “a gradual routinization of CRM activity” is to introduce CRM system in the business operation gradually. As a step to achieve this, a boss need to encourage subordinates to use the CRM system. Next factor is “to share the successful experience throughout the employees” i.e., every employee shares his own successful experiences by using CRM data to the others. The third one is “employee enlightenment” which is to hold seminars regularly for the employees in order to allow them to use the basic CRM system. The last one, “getting feedback from front line workers & improving CRM system,” is to get candid feedback on the CRM system from front line workers and improve CRM system for more effective use.

Barrier 2: Other departments do not make use of the customer’s information already
collected and analyzed by CRM.

“Regular meeting for CRM implementation by the head of every department” is for

formulating common understandings for the implementation of the CRM among every department. Board members need to reset the goal of each department for avoiding discord from every department. “Equal department distribution” is to distribute departments equally including analysis department so that every department would not have dissatisfaction toward the analysis department. This is better matched to Japanese organizational style than putting analysis department over the other departments.

Barrier 3: A misunderstanding that firms think CRM as almighty tool is spreading throughout the organization.

“Periodic goal setting review” is to avoid misdirection of CRM implementation. Board member should set goal step by step according to the firm’s level of present relationship with customers. For example, the first goal is to create customer relationship by making contact point with customers, and the next step is to enhance the relationship by improving the quality of its goods/services and so on.

Barrier 4: The organizational system has not been arranged for integrating and sharing information.

“System distribution for enabling every employee to access & edit” is the most important factor for the successful CRM implementation. It enables all employees to share the information and to make operating speed faster. The system doesn’t need to be settled one-by-one. “Regular meeting for sharing information between & within departments” is necessary for controlling common understandings among all employees and for getting opinion from front line workers who is in the closest position to customers.

Barrier 5: Required information can not extracted because of a difficulty of customer segmentation based on CRM data.

“Employee training” means to grow expertise for analyzing data. Moreover, firms need to do “customer segmentation from various perspectives.”

Barrier 6: Increases in costs and customer defection due to excessive approaches to the customers.

“Approach adapted the change of customer behavior” is to contact customers only when customers behavior changes, but not in the daily basis.

In this section, we conducted case studies to reveal the successful factors for fully

using CRM. In the next section, we construct our model based on these factors and demonstrate the model for the firms that still have problems with the barriers and CRM ASSOCIATION JAPAN.

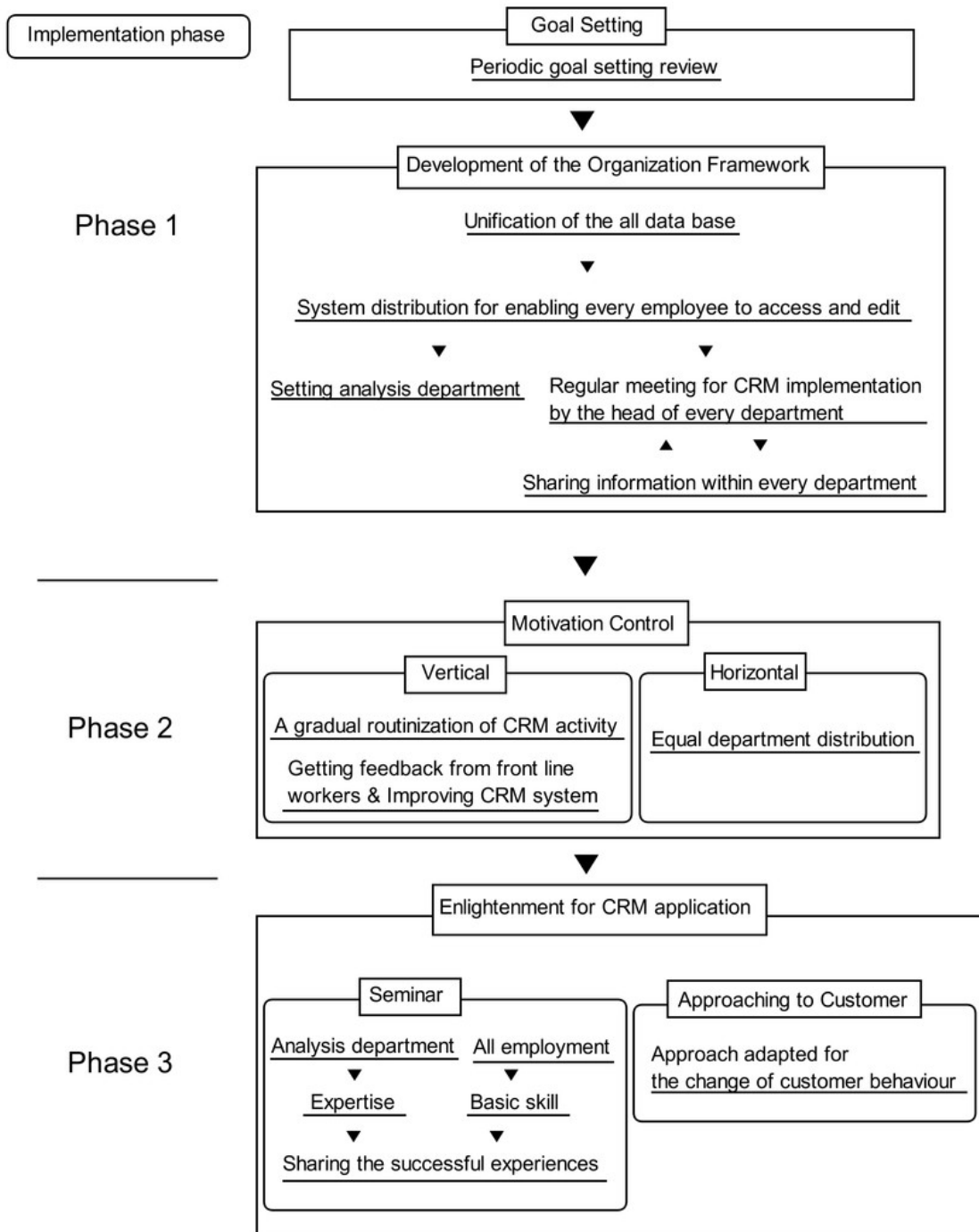
7. The Proposal of Effective CRM (E-CRM) Model

In this section, we firstly construct the model for the effective use of CRM based on the result from the case studies reported in the last section. Secondly, we report on the interview surveys conducted with 2 firms and CRM ASSOCIATION JAPAN to demonstrate whether our model is effective for firms or not. Finally, we propose the E-CRM model as the result of our research.

7-1. Construction of E-CRM Model

Based on the factors we extracted from case studies, we construct our model by arranging the factors into three phases by the order firms need to follow when they implement the model. Thus, we construct our model as below (Figure 10):

Figure 10. Our model for effective implementation of CRM



7-2 Demonstrating Our Model

In this chapter, we demonstrate our model based on the interview survey conducted

with 2 firms that answered they still had problems in implementing CRM at the questionnaire survey. In addition, we demonstrate our model to CRM ASSOCIATION JAPAN to get a general feedback. The result of demonstrating is given as below (Figure 11):

Figure 11. The result of case studies for demonstrating our model

Firm's name	CRM ASSOCIATION JAPAN	Firms A	Firms B
Industry	/	Pharmaceutical	Financial
Employees		About 200 peoples	About 1500 peoples
Sales		About 125 billion	About 700 billion
Date and time	October 29 15:15~16:30	October 30 19:00~20:00	October 31 16:00~17:00
Interviewee	The director & The chairman	The person in charge of CRM from marketing department	The person in charge of CRM from marketing department
Feedbacks	CRM is a tool to create long-term relationships with customers, so a company-wide implementation is really good. It must be better if the goal is customer centric one. All important factors are included in this model.	The model showing the organizational framework for CRM is innovative, and it would be the key to success. It's difficult for us to implement throughout organization from the beginning.	We think this model makes firms get success in implementing CRM. It would be better if evaluation criteria for employees were shown.

Based on this matrix of our case studies, we extracted the common facts in each code as below.

Code 1: The common fact of the effectiveness of E-CRM model

- ① All organizations mentioned our model is effective.
- ② All important factors are included in this model.

Code 2: The practical feedbacks to E-CRM model

- ① It must be better if the goal is customer-centric.
- ② It's difficult to introduce CRM throughout the organization from the beginning.

From this interview survey, it is shown that all of the important factors are included in our model, and this model would work effectively in implementing CRM. However, it is also revealed that it is difficult for the firms to introduce the CRM throughout organization from the beginning. Therefore, we modify our model with this opinion in mind in the next chapter.

7-3 The Proposal of E-CRM Model

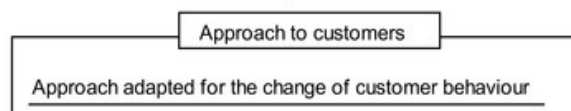
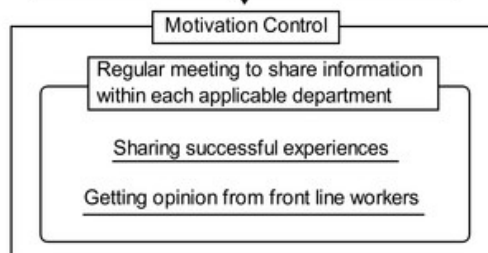
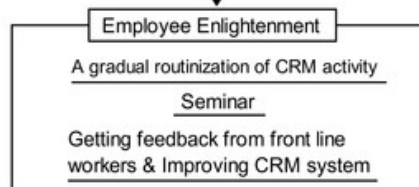
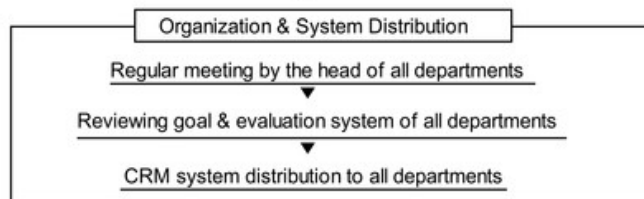
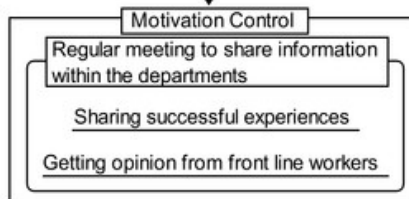
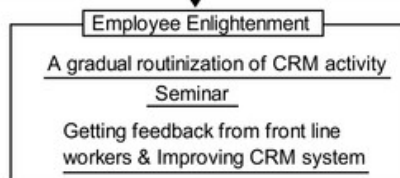
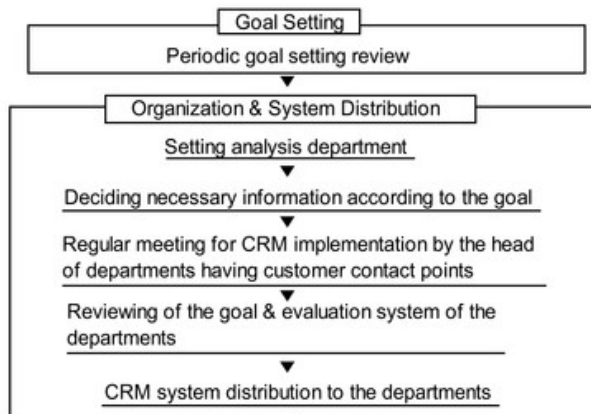
In the following chapter, we constructed and demonstrated our model by asking the

actual implementation to the firms. In this chapter we eventually propose our model as the result of this research. We reconstruct our model by referring to the opinions we summarized in the last chapter (figure 12). We set two phases. Phase 1 is for CRM implementation within the departments having customer contact points. Phase 2 is for a comprehensive CRM implementation.

Figure 12. The E-CRM Model

Implementation phase
to customer orientational organization

Phase 1
CRM implementation
within the department
having customer contact points



Based on the empirical approaches, we finally propose E-CRM model (Effective CRM model). Which enables firms to effectively implement the CRM overcoming the barriers.

In phase 1, firms start arranging the organization only within the departments that have customer contact points for constructing the base for CRM implementation. As the first step of phase 1, firms need to review their goals, and they should be reset periodically for CRM implementation. The next step is to distribute the system to the departments that have contact points with customers. The important point here is to get the deep understandings from the heads of the departments. Firms need to start from the setting of the analysis department, and the department decides the necessary information according to the goals firms settled. The necessity of the information should be understood by the heads of the departments gradually at the regular meetings. After having obtained understandings from the heads, the board members reset the goal and evaluation system of the departments according to the goal of the CRM implementation. By doing so, the board members can distribute the CRM system throughout the departments. The next step is to get the understandings from the other employees, not only from the heads in the departments. The heads should check whether employees are

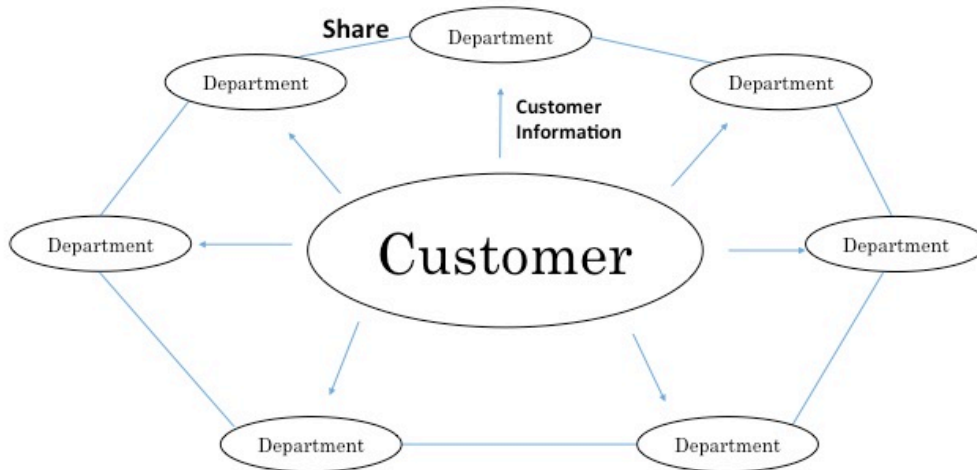
using CRM system or not, and get the feedback regarding the system actively for the easy use. Firms should hold seminars as well for enabling the employees to use the CRM system freely. The last step of phase 1 is to hold regular meetings within the department to share effective opinions from front line workers, and share the successful experiences to motivate them.

In phase 2, firms expand the organizational framework throughout all departments. At the first step of phase 2, firms need to hold meetings with the heads of every department so that the board members can gradually obtain understandings for CRM implementation from all heads who usually do not have contact points with customers, which enables the board members to introduce the CRM system speedily and deeply throughout the organization. Firms can take the same routine as that of phase 1 afterward.

Furthermore, this model also encourages firms to reconstruct their organization heading toward the customer-centric organization. By getting information from front line workers, sharing the information continuously throughout the departments, and heading to the same goal, the organization should unite, and the core of the

organization would change to its customers (Figure 13).

Figure 13. The customer centric organization through E-CRM Model



8. Conclusion

In this chapter, we describe Implications, a limitation and an expansion of our study.

Finally, we conclude our study by expressing the deepest appreciation to our professors,

teachers, friends, and firms.

8-1 Main Findings and Implications

1. Theoretical Implication

In the field of CRM study today, although it is advocated and demonstrated by many researchers that CRM is an effective approach (Payne and Frow 2005, Mithas et al. 2005, Minami 2005), there is no practical model with empirical approaches. As we described in the third section, the study of CRM has been not focused any more among the researchers even though it is still not established. We focused on the fact that the importance of CRM is becoming bigger in the practical scene and developed CRM study by empirical approaches. We revealed the actual barriers of CRM implementation by a quantitative research. Moreover, we constructed the E-CRM model that encourages firms' full implementation of CRM by comparative analysis from case studies.

2. Practical Implication

Even though many researchers proposed many barriers in CRM implementation, the method for an effective CRM implementation over those barriers has not proposed. We construct the model for the effective use of CRM based on the correct steps with empirical approaches: case studies with 5 out of 13 firms that do not have any problems for CRM and demonstrating to 2 firms and CRM ASSOCIATION

JAPAN. We eventually got feedbacks, from all organizations at demonstrating, that “E-CRM model is effective.”

This model is well matching to Japanese firms in terms of extracting factors from Japanese firms. CRM has been born and raised in the U.S., therefore, CRM implementation is basically required the western organizational framework. From this point of view, we propose our model as Japanese-style-CRM model.

This model also enables firms to reconstruct their organizational framework towards customer centric as we described in the seventh section. This framework is, in the real sense, the best for implementing CRM.

8-2 Scope and Limitation of Our Study

Firstly, we planned to score LTV by questionnaire survey to reveal the actual effectiveness of CRM implementation as we described in the fifth section. However, because of the confidentiality of the firms, we could not get the numeral data of the effectiveness of CRM implementation. However, our original purpose of the questionnaire survey is to select the firms that have no problems in CRM

implementation and reveal the actual barriers of CRM. Therefore, the importance of LTV score is relatively low in our research.

8-3 Expansion of Our Study

Our model is well structured for constructing organizational framework for effective use of CRM, however, the method of evaluation system is lacked. If we created the evaluation system adapted for this organizational framework, this model would be more concreted and could encourage the firms to implement CRM with less time, and less friction.

8-4 Acknowledgement

We especially would like to express our deepest appreciation to Professor Tetsuya Usui for his elaborated guidance, considerable encouragement and invaluable discussion that make our research more profound. Also, we would like to express our sincere gratitude to Professor Reiko Okabe, Christie Petrakopoulos and Andy Wynyard who are the master students at Stockholm university for correcting our English.

Furthermore, We would like to thank the firms. Without enormous contribution of the firms, this study could not progress. Finally, We are very grateful to classmates of Usui seminar for their valuable cooperation and in-depth discussion.

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Attachment 1. The list of the secondly data

Name of data source	BOOK and URL	
	Business activity. Industry	
I.M.press	CRM yearbook 2006-CRM&direct marketing a successful collection. They present introduced CRM cases. And that publish.	
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	CRM yearbook 2008-CRM&direct marketing a successful collection. They present introduced CRM cases. And that publish.	
	CRM yearbook 2009-CRM&direct marketing a successful collection. They present introduced CRM cases. And that publish.	
	CRM yearbook 2010-CRM&direct marketing a successful collection. They present introduced CRM cases. And that publish.	
	Microsoft Dynamics	The list of introduction example. http://www.microsoft.com/ja-jp/dynamics/crm-case.aspx Consulting firm Service/ Infrastructure/Communication/Production/ Real estate/Construction/Culture/Medical
	Toshiba solution	The list of introduction example.

company	http://www.toshiba-sol.co.jp/sol/crm/jirei/index_j.htm
	CRM vender Service/Finance/Communication/Production/Medical /Food
CRM solutions company	The list of introduction example. http://www.crm.co.jp/case.html
	They present introduced CRM cases. Food/Medical /Production/Finance/Service/Construction/ Real estate/Culture
Company salesforce dotcom	The list of introduction example. http://www.salesforce.com/jp/customers/#sort=all
	Consulting firm Food/Service/Travel/Retail/Distribution/Sport team/Medical
Company brainpad	The list of introduction example. http://www.brainpad.co.jp/case/solution.html
	Consulting firm Finance/Service/Retail/Production/Food service
Plus a consulting	The list of introduction example. http://www.pa-consul.co.jp/
	Consulting firm Food/Production/Travel/Finance/Security
NI consulting company	The list of introduction example. http://www.nisfa.jp/jirei/
	CRM vender Production/Wholesale/Retail/Service/Infrastructure/Hotel
Canonesukisystem company	The list of introduction example. http://www.canon-esys.co.jp/casestudy/
	Consulting firm

	Production/Sport team/Service/Retail/Communication
Nihon oracle	The list of introduction example. http://www.oracle.co.jp/campaign/lp/rightnow/crm/jirei.html
	Consulting firm Finance/Retail/Insurance
Teradata	The list of introduction example. http://jpn.teradata.jp/casestudy/industry.html
	CRM vender Retail/Finance/Production/Wholesale/Service/Communication/ Transportation
Synergy	The list of introduction example. http://www.crmstyle.com/showcase/
	Consulting firm Retail/Wholesale/Sport team/Publication/Finance/ Infrastructure/Insurance/Culture/Communication/ Food service/Real estate
Sales manager	The list of introduction example. http://www.e-sales.jp/results/
	CRM vender Insurance/Retail/Infrastructure/Wholesale/Food/Production/ Travel/Service/Construction
KREISEL	The list of introduction example. http://www.kreisel.bz/usersvoice/
	They present introduced CRM cases. Retail/Communication/Finance/Production/Service

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Attachment 2. The content of our questionnaire survey

CRM アンケート調査

1. CRM の運用に関して、現在問題を抱えていますか。

Yes → 4. の質問にご回答をお願いいたします

No → 3. の質問にご回答をお願いいたします。

2. 1 の質問で No と回答された方にお伺いします。
CRM の運用に関して、導入時から現在に至るまで問題はございましたか。

Yes → 4. の質問にご回答をお願い致します。

No → CRM の運用に関して、何か特別な取り組みはございましたか。

ご記入欄：

次ページも引き続きご回答お願い致します。

3. 1または2の質問でYesと回答された方にお伺いします。

CRMの運用に関してどのような問題を抱えていますか/いましたか。
以下の(1)~(6)の問題についてそれぞれ貴社の現状を回答してください。

問題(1)業務内容の変化による販売現場（営業スタッフ）のモチベーション低下。

問題がある やや問題がある あまり問題はない 問題なし

問題(2)CRMによって収集し解析した顧客情報の重要性に対し、他部門から理解が得られていない。

問題がある やや問題がある あまり問題はない 問題なし

問題(3)CRM導入のみで成果が上がるという誤解が組織内部に蔓延している。

問題がある やや問題がある あまり問題はない 問題なし

問題(4)CRMに対応した、情報を一元化・共有をする為の組織体制の整備ができていない。

問題がある やや問題がある あまり問題はない 問題なし

問題(5)データに基づき顧客をうまくセグメントできず、必要な情報を抽出できない。

問題がある やや問題がある あまり問題はない 問題なし

問題(6)顧客への過度なアプローチによるコストの増大と顧客の離反。

問題がある やや問題がある あまり問題はない 問題なし

問題(7) その他、何か CRM 導入と活用において問題があればご自由にご記入くだ

さい。

アンケートは以上になります。ご協力ありがとうございました。

アンケートは以下の連絡先までご送付お願い致します。

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Attachment 3. The content of our mail survey

「CRM に関するインタビューのお願い」

日本大学法学部白井ゼミナール

拝啓貴社ますますご清栄のこととお慶び申し上げます。

日本大学法学部白井ゼミナールでマーケティングを専攻しております篠原健太と申します。私どもは大学生論文の全国大会(国際ビジネス研究インターカレッジ)での優勝を目指して、日々研究に取り組んでおります。

私たちは CRM(顧客関係管理)について研究しております。CRM はその重要性が認識されているにも関わらず、複数の調査結果によれば、効果的に活用できていない企業が少なからず存在しています。私たちはこの CRM 導入と活用の問題に目を向け、活用の阻害要因の特定と今まで提示されて

こなかった阻害要因に対する解決モデルの構築を目指しております。この事により、企業様にはより一層の CRM の効果的な活用を行って頂けると確信しております。

先日はアンケートにご回答いただきありがとうございます。是非、書面インタビューという形でお話をお伺いしたいのでお忙しい中ですがご回答よろしくお願いたします。

インタビュー目的

- ・ CRM 活用における成功要因の抽出

インタビュー内容

以下の CRM 活用における阻害要因に対して、それを克服すべく貴社が取り組んだことはございましたか。

- 1.業務内容の変化による販売現場(営業スタッフ)のモチベーション低下。



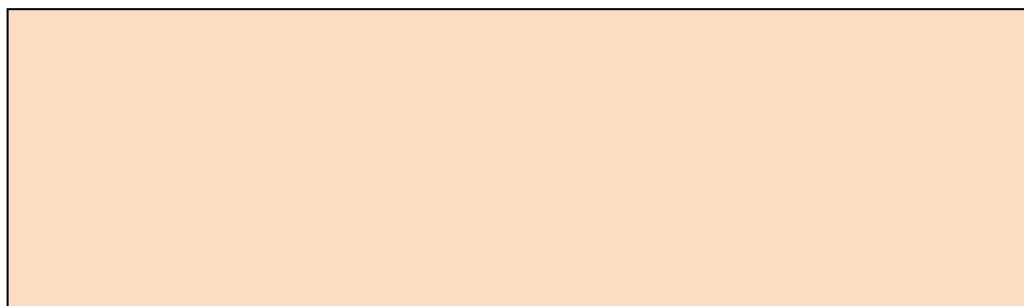
- 2.CRM によって収集・解析した顧客情報の重要性に対して、他部門から理解が得られていない。



3.CRM 導入のみで成果が上がるという誤解が組織内部に蔓延している。



4.CRM に対応した、情報を一元化・共有する為の組織体制の整備ができていない。



5.データに基づき顧客をうまくセグメントできず、必要な情報を抽出できない。



6.顧客への過度なアプローチによるコストの増大と顧客の離反。



その他、何か CRM 導入と活用において取り組まれたことがございましたら
ご自由にご記入ください。



インタビューは以上になります。ご協力ありがとうございました。