AN INVESTIGATION INTO THE USE OF THE CUSTOMER RELATIONSHIP MANAGEMENT TOOLING SYSTEM OF IBM SOUTH AFRICA

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ABSTRACT

In August 2013, IBM SA rolled out a new CRM information system called SalesConnect, with the aim of achieving cross communication across the various brands and divisions within IBM SA, as well as the sales and client executive teams who ultimately own the customer strategy. Unfortunately, the ineffective use of SalesConnect in the rollout stages resulted in reduced sales, inconsistent communication between IBM SA and its internal organisation, as well as unstructured engagements with customers and business partners. Consequently, as time has passed there is a need to investigate how SalesConnect is in fact being used within IBM SA. The sample frame for this research study was based on all the client executives employed within IBM SA, which constitutes 30 client executives. Consequently, the sample size was set at 30 client executives, which was the total population of client executives, referred to as a census. Questionnaires, designed to measure the uses of the CRM information system of IBM SA, were distributed to the willing client executives via an email with a link to the Survey Monkey platform. The statistical analysis of the data collected included a descriptive statistical analysis, correlation analysis, an independent-sample t-test and cross tabulation. The findings of the research study suggest that the client executives of IBM SA have positive perceptions regarding the use of the current information system, SalesConnect.

KEYWORDS: Customer Relationship Management, IBM, South Africa

1. INTRODUCTION

Rouse (2016) defines CRM as an interactive process for achieving the optimum balance between corporate investments and the satisfaction of customer needs, in an effort to generate revenue. Shaw (2015) adds that the main purpose of a CRM information system is to measure the inputs across the various functions within an organisation, against the outputs. These include customer revenue, profit and value, all essential in acquiring continuous feedback regarding the needs and consequent behaviours of an organisation's customers. Therefore, CRM information systems can be viewed as an avenue for organisations to develop appropriate relationships with customers, through communication, handling conflict and creating long-term revenue (Borillo, 2014). Naganuri (2016) adds that organisations that do indeed implement CRM information systems and link them to organisational sales and marketing efforts will be able to create long-term advertising or marketing campaigns. These can then be used to convert reluctant customers into buyers and improve overall sales.

2. LITERATURE REVIEW

According to Chipman (2017), before organisations can implement a CRM information system, changes need to be made within each organisational department and management needs to head up the process. Ecomy (2017) argues that all organisational processes will need to be focused on the customer and that teamwork will be crucial. In addition, all organisational technologies and processes should assist organisations in developing mutually beneficial customer relationships (Edwards, 2018). Organisational management needs to focus on including customers within the main processes of organisations, which will allow for customer and organisational collaboration, in turn creating value (Bhalla, 2016). Consequently, when implementing CRM information systems, organisations need to ensure that they integrate all communications with the customer through the use of organisational technology, employees and processes (Rahimi, 2015).

2.1 Technology as the facilitator of CRM

Parumasur and Roberts-Lombard (2014:365) stipulate that technology facilitates the implementation of CRM and if no technology exists within an organisation, CRM will not be possible. Chang *et al.* (2010:850) add that CRM technology is a means to encourage sales support, service support, data analysis and integration. Consequently, with the use of CRM technology, organisations can build customer relationships, enhance customer care and services and identify the best customers.

This will assist in establishing which products or services will be the most effective to produce or provide and how to best customise products or services. Furthermore, it will assist organisations in enhancing their capabilities, managing the costs and value of relationships with customers, promoting control within organisations and fostering customised interaction and communication (Parumasur & Roberts-Lombard, 2014:366-368).

2.2 Customer Intimacy Strategies

Cochran (2014) explains that in order for organisations to achieve client intimacy, an organisation needs to excel in areas which include, but are not limited to, customer service and customer attention. Ehrens and Kiwak (2018) highlight that the focus of CRM is to ensure that an organisation's products and services are delivered to customers according to customer expectations, which in turn will provide customers with an exceptional customer experience. Mars (2013) indicates that customer intimacy creates benefits whereby organisations can provide the customers they serve with highly tailored problem-solving capabilities and the greater adaptation of products to customer needs, which will result in higher customer loyalty levels.

2.3 CRM relational information processes

CRM relational information processes (RIP) can be used to explain the role of CRM technologies within an organisation (Ehrens & Kiwak, 2018). Hillebrand *et al.* (2011:595) postulate that RIP refer to the extent to which an organisation is involved in the systematic registration, integration and analysis of customer information. In addition, RIP are focused on initiating, retaining and maintaining long-term customer relationships (Chang *et al.,* 2014:147). As such, RIP are believed to be instrumental in the pursuit of CRM and are not dependent on the CRM technology used, as without proper management a CRM information system can end up being a glorified database in which customer information is stored.

2.4 Customer Insights

Ozeritskaya (2015) articulates that customer insight is having a deep understanding of the customer, based on the experiences, behaviour, needs, desires and beliefs of the customer concerned. This deep understanding in turn needs to be relevant to organisational transactions, so that organisations can identify what the customer is doing, why they are doing what they are doing and what is the element that nobody has noticed before that sets the customer apart from other customers. Selz (2017) postulates that data analysis plays a vital role

into obtaining valuable insights into the customers of organisations and how they operate.

2.5 Customer based performance & relational performance

Stillwagon (2015) defines customer based performance as a measurable monetary or non-monetary result of a customer relationship in a specified period of time. Chang and Ku (2009:336) define customer-based relational performance as a process that measures intangible CRM benefits. Consequently, when individual customer revenue increases and costs decrease, the overall customer satisfaction improves due to the better customisation of both product and service offerings, customer retention and profitability. As such, organisations must ensure that they provide exceptional customer service by providing customers with the best possible customer service and product purchasing experience possible (Gregory 2017). This highlights the need for organisations to investigate how customers make use of their products or services so that organisations can ensure that the customer experience is the organisation's top priority (Slater 2017). In addition, not only do organisations need to ensure that customer experience is a top priority, but that an organisation's customer experience is shareable. This may be done via the use of packaging or how an organisation connects with influencing customers (Crook, 2016).

2.6 Customer-based profit performance

Customer-based profit performance can be measured by three indicators, namely the identification of profitable customers, acquisition and retention of profitable customers and the conversion of unprofitable customers to profitable ones. Similarly, these measures may be used to measure customer value (Ahmed, 2016:23). Perrson (2013:863) highlights that changes in customer behaviour may be linked to the reduction of customer related costs and when these customers have been identified, acquired, retained and converted, marketing campaigns can be launched accurately based on customer needs, which will indefinitely improve overall sales.

2.7 Interaction orientation

Interaction orientation is a gateway for value creation for both organisations and customers alike (Chang *et al*., 2014:148). Consequently, interaction orientation has become a vital component for organisations to have if organisations wish to develop a sustainable competitive advantage and superior organisational performance in the interactive modern organisational environment (Yuan & Liu, 2013:1214). Chang *et al.* (2013:102,103) argue that salespeople who are truly

concerned about the customers that they sell to, have high levels of interaction orientation. Yuan and Liu (2013:1214) add that interaction orientation is believed to have a significantly positive influence on organisations' customer-based performance. Organisations can effectively identify profitable customers, while developing and maintaining long-term relationships with customers and realising higher customer satisfaction levels, positive word-of-mouth and customer ownership. This can all be achieved by creating marketing beliefs based on individual customers, while ensuring full customer empowerment for the customers of the organisation. Similarly, organisation's can develop superior interaction response capacity and customer value management capabilities. In conclusion, interaction orientation contributes to the accomplishment of CRM RIP of organisations, while promoting customer-based performance. In addition, organisations analyse customer data at an individual level, which provides organisations with a means to provide customised products or services to the organisation's customers in an attempt to satisfy customer demands (Chang *et al*., 2013:102).

2.8 Customer Relationship Management readiness

Ramani and Kumar (2008:33) indicate that CRM readiness is the ability of an organisation to collaborate CRM with its infrastructure, software, departments and employees, to effectively implement its CRM RIP. As such, CRM readiness constitutes two dimensions, namely organisational readiness and technological readiness.

Vallabh *et al.* (2015) suggest that organisations that wish to adopt a CRM information system need to have an advanced level of organisational readiness. DuŃu and Hălmăjan (2011:106) highlight that organisational readiness is directly linked to the amount of technological resources an organisation may have that support CRM adoption. Chang *et al.* (2014:149) add that by encouraging customer-centric methodologies and strategies in an attempt to measure organisational performance, organisations increase their levels of organisational readiness. Furthermore, technology readiness supports the development of organisational capabilities, which can provide a competitive advantage. This indicates the importance of technology readiness in ensuring CRM success.

3. RESEARCH PROBLEM

According to Price (2017), IBM SA launched a new CRM information system, referred to as Siebel, in 2004, which replaced the previously used CRM information system, known as Omsys. There were a number of limitations with

both Siebel and Omsys, including forecasting, flexibility in terms of being operational on mobile platforms and limited options to triangulate the various brands, more commonly known as business units within IBM SA. In August 2013, IBM SA introduced a new CRM information system, known as SalesConnect, with the aim of achieving cross communication across the various brands and divisions within IBM SA, in addition to the sales client executive teams who ultimately own the customer strategy. Similarly, SalesConnect was intended to be used as the single source of truth, meaning all customer information was to be kept updated and consistent with real time activity within SalesConnect itself. Unfortunately, in the beginning the data which was migrated from the legacy CRM Siebel was not updated. As such, old, inconsistent information was loaded into the new CRM SalesConnect. The sales employees within IBM SA immediately noticed when accessing the new CRM SalesConnect that the data was migrated from the legacy information system without being cleaned first. Consequently, the ineffective use of SalesConnect resulted in reduced sales, inconsistent communication between IBM SA and its internal organisation, including unstructured engagements with customers and business partners. Owing to SalesConnect being used for several years now and with the problems having being ironed out, there is a need to investigate how it is currently being used within the organisation. The results of the research study will provide IBM SA with an indication of how SalesConnect is being used within its organisational operations and identify any gaps that may exist.

4. RESEARCH METHODOLOGY

The questionnaire comprised of nine sections. With the use of a combination of dichotomous and multiple-choice questions, Section A was used to gather demographic data. The scale from Hillebrand *et al.* (2011:605) was used to construct Section B and C of the questionnaire, measuring IBM SA's client executives' perceptions of the use and presence of CRM and the customer intimacy strategy currently in place within IBM SA. Section D, which was adapted from the scales of Hillebrand *et al.* (2011:606) and Chang *et al.* (2014:154), measured perceptions of the relational information processes and Section E measured perceptions of the customer insights (Hillebrand *et al.,* 2011:606). Section F, which was adapted from the scales of Hillebrand *et al.* (2011:606) and Chang *et al.* (2014:154), measured perceptions of customer-based relational performance, followed by Section G, Section H and Section I which made use of the scale by Chang *et al.* (2014:154), measuring perceptions of customer-based profit performance, customer interaction orientation and CRM readiness respectively.

A six-point Likert scale, ranging from 1= strongly disagree to 6= strongly agree, was applied to Section B up to and including Section I of the questionnaire. A cover letter was attached to the questionnaire, outlining the purpose and nature of the research study and requesting the participation of the respondents.

The target population of this research study constituted all of the client executives, a total of 30, from IBM SA's Financial Services and Public and Commercial sectors. The sampling frame was obtained from the list of client executives employed within IBM SA. Consequently, there are a total of 30 client executives employed between the four offices of IBM SA (Price, 2018). Farooq (2013) suggests that when all elements of a group, place or specific location are used to collect data for a research study, it is known as the census method. Owing to the fact that this research study used all the client executives employed within IBM SA to conduct the research study, it made use of the census method for the sample. In addition, due to the fact that the total number of client executives is only 30, Hassan (2018:3) suggests that census sampling is more appropriate to use for smaller populations. Farooq (2013) adds that the benefits of using this sample method include the opportunity for researchers to conduct an intensive research study which will provide extensive insight and knowledge on the topic under investigation.

The client executives for IBM were contacted, requesting them to complete the questionnaire. The client executives were notified that the questionnaire was not compulsory and that only those who would voluntarily like to participate may do so. Once the client executives agreed to participate, an online questionnaire was distributed to the willing client executives via an email with a link to the Survey Monkey platform. The Statistical Package for Social Science (SPSS), Version 25.0 for Windows, was used to analyse the captured data for this research study.

5. RESULTS OF THE STUDY

Of the 30 questionnaires originally sent to IBM SA's client executives, 30 questionnaires were returned. From the 30 responses received, two questionnaires had more than 10 percent of the values missing and were therefore discarded. Consequently, 28 useable responses were received and the scaled responses within the questionnaires with missing values of less than 10 percent were estimated, based on the mode. This indicates a 93.3 percent response rate.

According to Goforth (2015), Cronbach alpha is a well-known method that is used for testing the reliability of multiple-item scales and may take on any value between zero and one. The recommended value is that of above 0.6, which

indicates sufficient internal consistency reliability (Malhotra, 2010:319). As is evident from Table 1, Cronbach alpha values for each of the eight factors exceeded the 0.6 level, thereby indicating satisfactory reliability.

Table 1   Reliability and average inter-item correlation values

	Number of Items	Cronbach Alpha	Average Inter-item Correlation
CRM within IBM SA	5	0.651	0.272
Customer intimacy strategy	3	0.752	0.502
Relational information processes	22	0.935	0.394
Customer insights	8	0.907	0.549
Customer-based relational performance	4	0.752	0.378
Customer-based profit performance	3	0.771	0.529
Customer interaction orientation	4	0.632	0.300
CRM readiness	7	0.782	0.339

The descriptive statistics, based on the eight constructs used to investigate the effectiveness of the CRM information system of IBM SA, are outlined in Table 2.

Table 2   Descriptive statistics of constructs

Construct	Valid N	Mean	Standard Deviation	Skewness	Kurtosis
CRM within IBM SA	28	3.45	1.79	3.44	15.00
Customer intimacy strategy	28	4.19	1.19	-0.59	0.04
Relational information processes	28	3.67	0.80	0.20	-1.43
Customer insights	28	4.16	0.86	-0.36	-0.92
Customer-based relational performance	28	4.22	1.44	2.97	12.75
Customer-based profit performance	28	4.04	0.81	-0.79	0.48
Customer interaction orientation	28	4.38	0.73	-0.12	-0.09
CRM readiness	28	3.77	0.87	-0.26	-0.28

Table 2 reports on the skewness and kurtosis values for the data set in this research study. Given that all skewness values ranged between -2 and +2, except for customer-based relational performance, all scales can be considered as normally distributed. Based on the peaked-ness of the data distribution, all kurtosis values calculated, except for customer-based relational performance, indicate no indication of irregularity and as such, the data is deemed as normally distributed.

Based on Table 2, which summarised the descriptive statistics of the eight constructs, the highest mean values were computed for customer interaction orientation (mean=4.38) and customer-based relational performance (mean= 4.22), indicating that the client executives employed at IBM SA have strong,

positive perceptions regarding customer interaction orientation within IBM SA and customer-based relational performance within IBM SA. In addition, customer intimacy strategy (mean= 4.19), customer insights (mean= 4.16) and customer-based profit performance (mean= 4.04) all had means of above 4, indicating that the client executives employed at IBM SA have strong, positive perceptions regarding the customer intimacy strategy currently in place within IBM SA, customer insights within IBM SA and customer-based profit performance within IBM SA. Mean values above 3 were computed for CRM readiness (mean= 3.77), RIP (mean= 3.67) and the use and presence of CRM within IBM SA (mean= 3.45). This suggests that the client executives at IBM SA have positive perceptions regarding CRM readiness within IBM SA, the RIP within IBM SA and the use and presence of a CRM information system within IBM SA.

The lowest standard deviations were recorded on customer interaction orientation (Std. Dev. = 0.73), RIP (Std. Dev. = 0.80), customer-based profit performance (Std. Dev. = 0.81), customer insights (Std. Dev. = 0.86) and CRM readiness (Std. Dev. = 0.87), indicating that there was less dispersion in participants' reported perceptions regarding customer interaction, RIP, customer-based profit performance, customer insights and CRM readiness within IBM SA. Higher standard deviations were recorded on the use and presence of CRM within IBM SA (Std. Dev. = 1.79), customer-based relational performance (Std. Dev. = 1.44) and customer intimacy strategy (Std. Dev. = 1.19). This indicates that there was more dispersion in participants' reported perceptions regarding the use and presence of a CRM information system within IBM SA, customer-based relational performance and customer intimacy strategies currently in place within IBM SA.

The findings indicate that the client executives of IBM SA have positive perceptions regarding the use and presence of a CRM information system within IBM SA. The results indicate strong positive perceptions regarding the use and presence of an automated system that supports individual and group decisions regarding customers, as well as software applications for analysing customer information. Furthermore, there is a positive perception regarding the fact that IBM SA has several software applications regarding customer information that are linked to a network and a fully automated customer information system. Unfortunately, perceptions regarding the use and presence of an automated customer information system, which is integrated with other communication systems within IBM SA, such as the switchboard operators, complaints services and the like, were not positive.

In order to ascertain whether there is a relationship between the variables, namely the use and presence of a CRM information system, the customer intimacy strategy currently employed, RIP, customer insights, customer-based relational performance, customer-based profit performance, customer interaction orientation and CRM readiness within IBM SA, were significant, a correlation analysis was conducted.

Table 3   Correlation matrix

Constructs	1	2	3	4	5	6	7	8
CRM within IBM SA	1							
Customer intimacy strategy	0.056	1						
Relational information processes	0.168	0.538**	1					
Customer insights	0.061	0.522**	0.764**	1				
Customer-based relational performance	0.035	0.260	0.212	0.176	1			
Customer-based profit performance	0.105	0.715**	0.361	0.243	0.218	1		
Customer interaction orientation	0.297	0.427*	0.507**	0.581**	0.101	0.559**	1	
CRM readiness	0.208	0.617**	0.580**	0.331	0.225	0.619**	0.555**	1

**. Correlation is significant at the 0.01 level (2-tailed)

*. Correlation is significant at the 0.05 level (2-tailed)

As seen in Table 3, a statistically positive relationship exists between customer intimacy strategy and RIP ($r = 0.538$, $p = 000<0.01$), customer insights ($r = 0.522$, $p = 000<0.01$), customer-based profit performance ($r = 0.715$, $p = 000<0.01$), customer interaction orientation ($r = 0.427$, $p = 000<0.05$) and CRM readiness ($r = 0.617$, $p = 000<0.01$). RIP displayed a significant positive relationship with customer insights ($r = 0.764$, $p = 000<0.01$), customer interaction orientation ($r = 0.507$, $p = 000<0.01$) and CRM readiness ($r = 0.580$, $p = 000<0.01$). Customer insights showed a statistically positive relationship with customer interaction orientation ($r = 0.559$, $p = 000<0.01$). In addition, customer-based profit performance displayed a statistically positive relationship with customer interaction orientation ($r = 0.619$, $p = 000<0.01$) and CRM readiness ($r = 0.555$, $p = 000<0.01$).

It is evident that there is no statistically positive relationship that exists between the CRM information system of IBM, SalesConnect, and the customer intimacy strategy, the RIP, customer insights, customer-based relational performance, customer-based profit performance, customer interaction orientation and CRM readiness within IBM SA.

Based on Table 3, nomoligical validity can be asserted for the proposed effects that the use and presence of a CRM information system within IBM SA, the customer intimacy strategy currently employed, RIP, customer insights, customer-based relational performance, customer-based profit performance, customer interaction orientation and CRM readiness within IBM SA have on the effectiveness of the CRM information system of IBM SA (Malhotra, 2010:321). In addition, no evidence exists of irregular correlations, which indicates that no multicollinearity exists between the constructs of the research study.

In order to determine if any significant difference exists between genders concerning client executives employed at IBM SA and their years of sales exeperience at IBM SA, a cross-tabulation was employed in this research study.

Table 4   Years of sales experience at IBM South Africa by Gender

	Gender	
Years of Sales Experience at IBM SA	**Male**	**Female**
Least experience, 1 to 5 years of experience	31.6%	37.5%
Medium experience, 6 to years of experience	52.6%	37.5%
High experience, 10+ years of experience	15.8%	25%
Column Totals	100%	100%
Number of cases	19	8

a.   *4 cells (66.7%) have expected count less than 5. The minimum expected count is 1.48.*
b.   **. Statistically significant at p < 0.05*

Table 5   Chi-Square Test

	Chi-Square	DF
Pearson	0.746	2
Likelihood Ratio	0.747	2

Based on the findings in Table 4 and Table 5, there was no statistical significant difference between male and female client executives employed at IBM SA and their years of sales exeprience at IBM SA.

The following section discusses the findings obtained from the primary research undertaken in this research study.

6. FINDINGS

The findings indicate that there is dedicated CRM technology that allows for one-to-one communications with potential customers. IBM SA provides systematic training procedures for helping employees deal with different customers and rewards employees for building and deepening relationships with high-value customers. Furthermore, IBM SA invests in technology to acquire and manage "real time" customer information and feedback, which projects generated knowledge that has been turned into standardised rules or ways of doing similar tasks.

The results indicate that an automated system, which supports individual and group decisions regarding customers is indeed present and in use. In addition, there are software applications for analysing customer information. Furthermore, several software applications regarding customer information are linked to a network and a fully automated customer information system. Unfortunately, the use and presence of an automated customer information system, which is integrated with other communication systems within IBM SA, such as the switchboard operators, complaints services and the like, is lacking.

It is evident that the client executives have strong positive perceptions regarding the provision of multiple ways in which customers can contact the organisation, while the organisation maintains regular contact with customers. This involves focusing on communicating periodically with customers, collecting customer information by using external sources, using customer information to segment markets, enabling customers to have interactive communication with the organisation and making use of customer interactions to collect information. Furthermore, IBM SA makes use of customer information to customise product and service offerings, identify appropriate channels to reach customers, assess customer retention behaviour, develop customer profiles and collect customer information continuously. Customer information is captured from internal sources within the organisation, making it easy for the relevant employees to find and access the required customer information, even when other departments or functional areas have collected the information to manage customer relationships. Similarly, customer information from different communication channels and different functions have been integrated, this includes the integration of internal customer information with external customer information and customer information from the various functions that interact with customers, such as marketing, sales and customer service. Lastly, the organisation is perceived to systematically merge information collected from various sources for each

customer, ensuring that the information collected from customers is updated in a timely fashion.

The client executives know who their customers are, why some customers do not buy from the organisation anymore and why customers buy from the organisation and not from competitors. Client executives also know what it is that customers value specifically in the organisation's offers, which customers want an intensive relationship with the organisation and how the needs of the organisation's customers change through time. Positive perceptions were also measured with regards to client executives knowing what the underlying needs of their customers are and which of the organisation's means of communication are most valued by customers.

The organisation focuses on offering customers the best products for their needs on a continuous basis and offering customised products to customers. The findings also indicate that IBM SA focuses on building long lasting relationships with customers. The findings indicate that customers of IBM SA are repeat buyers of the organisation's products and based on good experiences, regularly express themselves positively about the organisation and are loyal customers. In comparison to the organisation's most important competitors, a higher percentage of the organisation's new customers come to the organisation because of referrals from existing customers.

7. CONCLUSION

A CRM information system, such as SalesConnect, is a vital tool for organisations to possess if they wish to encourage customer retention and build customer loyalty. The findings of the research study suggest that the client executives of IBM SA do make use of the current CRM information system, SalesConnect, employed within IBM SA. It is evident that the use and presence of SalesConnect is perceived to influence client executives' relational information processes, customer insights and customer intimacy strategies in a number of ways and that SalesConnect influences the productivity and daily schedule of the client executives in terms of customer-based performance, namely customer-based relational performance and customer-based profit performance. Furthermore, there is evidence of a customer interaction orientation within IBM SA and that the organisation is perceived to be CRM ready. Consequently, the client executives currently employed within IBM SA have positive perceptions regarding the use of the current information system, SalesConnect.

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