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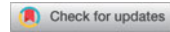
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# Customer Relationship Management Research from 2007 to 2016: An Academic Literature Review

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**ABSTRACT**

The purpose of this article is to review the literature on customer relationship management (CRM) to analyze the trends in CRM approaches, activities, tools, and implementation from 2007 to 2016. The objective is also to provide a classification of the literature with a comprehensive bibliography. The top 10 marketing journals, on the basis of SCImago rankings, were chosen for the study. A total of 56 research papers with 4633 citations emerged out of these top 10 journals for classification and analysis of different parameters. This research explores how CRM research has evolved over a period of 10 years in terms of key areas, research types, tools used, and most researched areas. It shows that the loyalty program is the most researched and published area with regard to CRM studies, whereas topics like privacy concerns and social CRM are underresearched areas. This article analyzes the CRM published research studies over a period of 10 years to provide topical classification, which can be useful for researchers, academicians, and practitioners to understand how CRM has progressed over the years. Since this article consists of the latest classification and analysis of CRM studies, it can be very meaningful for use in further teaching, research, and application by the industry. Also, none of the published research has reviewed the top 10 marketing journals to review and classify CRM articles. This article presents the first such review and therefore provides the latest classification and analysis of CRM literature.

## Introduction

Customer relationship management (CRM) has been an area of interest for most marketers and organizations. Heskett (1987) brought out the concept of market economics, in which he stated that results can be achieved in a better way by understanding the customers rather than concentrating on developing scale economies. Whatever the size of the company, everyone seems to be interested in the concept of CRM and is motivated to adopt CRM in a significant way. In today's competitive world of numerous service providers, rising costs, and demanding customers, it has become imperative for organizations to focus on maintaining customer loyalty and

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retaining customers. To do this, organizations are using information and processes that help them in serving customers better so that long-term meaningful and profitable relationships with customers can be established. It has always been clear that enhancement of customer relationships will lead to customer retention and, consequently, customer loyalty. The growth of information technology led to the upkeep and maintenance of customer data, providing opportunities to serve customers better. There are various definitions of CRM proposed by numerous authors. Parvatiyar and Sheth (1995, p. 5) defined customer relationship management as "a comprehensive strategy and process of acquiring, retaining and partnering with selective customers to creative superior value for both the company and customers. It involves the integration of marketing, sales, customer service and the supply chain functions of the organization to achieve greater efficiencies and effectiveness in delivering customer value." Kincaid (2003, p. 41) defines CRM as the "strategic use of information, processes, technology, and people to manage the customer's relationship with your company (Marketing, Sales, Services, and Support) across the whole customer life cycle." According to Swift (2001, p. 12), CRM is "[a]n enterprise approach to understanding and influencing customer behaviour through meaningful communications in order to improve customer acquisition, customer retention, customer loyalty, and customer profitability."

Many scholars have attempted to analyze the literature in the area of CRM. Ngai (2005) attempted an academic literature review of CRM from 1992 to 2002 in which 205 articles were classified and reviewed. The papers were allocated to various categories and subcategories; namely general, marketing, sales, service and support, and Information Technology (IT) and Information System (IS). The entire literature on CRM was classified by the year of publication, topic area, and journal. Wahlberg et al. (2009) performed a literature review of all articles in three major databases with full text access of the articles and papers written on CRM. The three databases were Science Direct, IEEE, and Emerald. They reviewed how CRM has developed over the years in their literature review from 1998 to 2006. The entire literature on CRM is classified into four broad categories: strategic CRM, operational CRM, collaborative CRM, and analytical CRM. Their research concluded that the maximum number of articles published on CRM are in the fields of strategic CRM and analytical CRM. Their research also stated that most of the articles published on CRM have a large-scale enterprise bias. There is a need for small-scale enterprise CRM experience to be analyzed and published.

An academic review of the literature on relationship marketing, published by Das (2009) , classifies the literature into five categories: objectives, constructs, tools used, applications, and issues addressed. A total of 209 papers from 1994 to 2006 were reviewed in this study. Karunanithy and Kajendra (2012) reviewed the literature on CRM to understand how the definition of CRM has evolved over the years, beginning inthe 1990. Their research work presented a bibliography of the definition and use of the phrase CRM in literature. Samiee, Chabowski, and Hult (2015) examined the literature on international relationship management (IRM) to provide avenues for further research. They reviewed 3509 articles in 29 publications to study IRM

and used citation and co-citation analysis to identify the structure of the published work. Their research did not focus on CRM, but studied international dyadic relationships between various stakeholders.

Many organizations worldwide are spending substantial amounts of money to install CRM systems and processes. Whereas the philosophy of CRM seems consistent and has not been challenged over time, the activities, tools, and implementation strategies have changed significantly. This article reviews customer relationship management research published in the top 10 worldwide marketing journals from 2007 to 2016. This article analyzes the trends in CRM approaches, activities, tools, and implementation over the last decade. It also summarizes the research topics within the field of CRM, along with the themes used. The recent developments, along with gaps and further scope of the research in the area of CRM, are detailed. This article provides a background for researchers seeking an understanding of the trends in CRM through an extensive review of the literature, and will help in developing new paradigms and directions for further research and studies.

## Methodology

A total of 10 marketing journals were chosen for this literature review. The marketing journals are *Journal of Consumer Research, Journal of International Marketing, Journal of Marketing, Marketing Science, Journal of the Academy of Marketing Science, Journal of Business Research, Journal of Interactive Marketing, International Journal of Research in Marketing, International Marketing Review*, and *Journal of Consumer Psychology*. The journals were selected on the basis of SCImago rankings. SCImago Journal Rank (SJR indicator) is a measure of the scientific influence of scholarly journals that accounts for both the number of citations received by a journal and the importance or prestige of the journals where such citations come from. The time span for this literature review is 10 years, from 2007 to 2016. The articles published in these journals on CRM were selected for this literature review. A total of 56 research papers with 4633 citations emerged out of these top 10 marketing journals on CRM. Any book reviews or editorial comments were excluded, and only referreed papers were included in this study.

The questions that this literature review aims to answer are:

- How much space has CRM literature occupied in the top 10 marketing journals?
- What are the major themes and topics of research under CRM?
- What are the most researched areas and gaps in the CRM literature?

Once the articles were gathered, each was coded on the basis of research done, whether empirical or conceptual. Each of the articles was classified on the basis of its key focus area or topic, and then a topical segregation was done of the entire CRM literature. The frequency of CRM articles in top 10 marketing journals, along with the research methods and analysis used in that research, was noted. Through the classification of all of the CRM articles/papers in these marketing journals, this report analyzed the trends in the CRM field over the past decade.
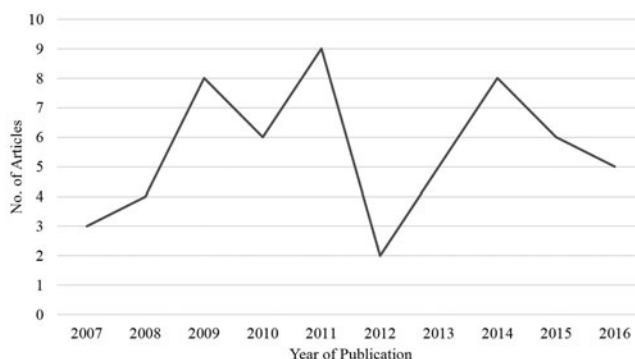
**Figure 1.** Distribution of articles by year of publication.

## Classification results

The collection of articles was classified on the basis of themes and topics, along with year of publication and journal. A classification was done on the type of research paper and tools and methodologies used. The classification results are as follows.

### Classification of articles by year of publication

Looking at the number of articles published on CRM in the previous decade in these journals, the maximum number of articles published in any particular year is nine. The year 2012 had a minimum number of articles published; i.e., two. As such, no clear pattern has emerged by plotting the distribution of articles by year of publication. All of the journals are published either once in two months or once in three months. An average of six articles were published on CRM in the top 10 marketing journals over the period of 10 years. A total of 54% of the total articles were published in the first five years under study, and the rest were published in the last five years. This shows that almost an equal amount of CRM research was published during the first and last five years. Figure 1 shows the number of articles published on CRM over the last 10 years.

### Classification of articles by subject

The subject classification of papers in customer relationship management is depicted in Figure 2. The majority of articles pertain to reward/loyalty programs. Of the total number of articles published on CRM, 38% of the articles focused on loyalty/reward programs. Loyalty programs are one of the most common techniques used by organizations to build long-term relationships with customers. In this review, it emerged that most of the CRM research papers are about loyalty programs, although loyalty programs are studied from varied perspectives in these papers. While many of them empirically tested the importance of loyalty programs, very few reviewed the historical literature on reward programs. Intense competition and knowledgeable customers have led to the penetration of loyalty programs
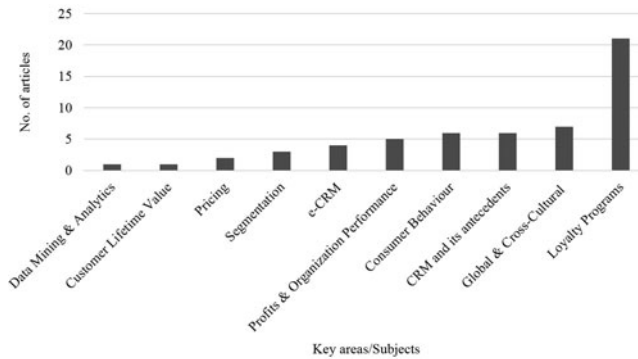
**Figure 2.** Distribution of articles by key areas/subjects.

across various consumer products and services (Liu & Yang, 2009). Liu (2007) also attempted to capture the behavioral change in consumers once they acquire membership in a loyalty program. His research concluded that loyalty programs have different effects on the behavior of consumers, largely dependent on the initial usage of the consumer. Therefore, marketers need to consider consumer idiosyncrasies while evaluating a reward or loyalty program.

The research on loyalty programs is followed by global and cross-cultural aspects of CRM, which constitute 13% of the total research papers, taking into consideration the cross-cultural aspect of CRM, or how CRM is varied across cultures. A large number of organizations are operating globally and therefore dealing with customers from different regions and cultures. It is thus imperative for organizations to focus on international CRM. The adoption of CRM programs for multinational companies is very challenging, as consumer behavior varies across different cultures and nationalities. Samaha, Beck, and Palmatier (2014) conducted an in-depth review of the literature on cross-cultural relationships and studied the behavior of stakeholders from a cultural perspective. Their study conducted meta regression of 170 existing studies to understand cross-cultural relationship dynamics. They adopted Hofstede's dimensions of culture to conduct their research. Their research discovered that relationship marketing (RM) is more effective in developing nations like Brazil, China, Russia, and India than in the United States. Their research also stated that communication plays an important role in building long-term relationships in both Eastern and Western cultures. CRM and its antecedents occupy 11% of the total CRM published research in this area.

Next were articles on consumer behavior and purchase behavior, followed by research papers on profits and organization performance. CRM has a positive impact on organization performance and also on new product performance (Ernst et al., 2011). Their research of 115 R&D and marketing managers stated that CRM can be used to get customer data, which is very useful in the development of new products. With the increasing percentage of new product failures, organizations can use CRM to make and improve their products.

**Table 1.** Bibliography of reviewed literature.

| Subject headings | Bibliography |
| --- | --- |
| Data Mining & Analytics | Peltier et al. (2013) |
| Customer Lifetime Value | Persson and Ryals (2014) |
| Pricing | Shin and Sudhir (2010), Wieseke, Alavi, and Habel (2014) |
| Segmentation | Netzer, Lattin, and Srinivasan (2008), Trusov, Ma, and Jamal (2016), Zhang (2011) |
| e-CRM | Keeling, Keeling, and McGoldrick (2013), Kunz and Seshadri (2015), Malthouse et al. (2013), Trainor et al. (2014) |
| Profits & Organization Performance | Chang, Park, and Chaiy (2010), Ernst, Hoyer, Krafft, and Krieger (2011), Krasnikov, Jayachandran, and Kumar (2009), Kumar, Dalla Pozza, Petersen, and Shah (2009), Palmatier, Scheer, Houston, Evans, and Gopalakrishna (2007) |
| Consumer Behaviour | De Cannière et al. (2009), Neslin et al. (2013), Hui, Ho, and Wan (2011), Marinova and Singh (2015), Miquel-Romero, Caplliure-Giner, and Adame-Sánchez, 2014, Schweidel, Fader, and Bradlow (2008) |
| CRM and its antecedents | Harmeling, Palmatier, Houston, Arnold, and Samaha (2015), Hillebrand, Nijholt, and Nijssen (2011), Ko, Kim, Kim, and Woo (2008), Palmatier, Jarvis, Bechkoff, and Kardes (2009), Palmatier, Scheer, Evans, and Arnold (2008), Verma et al. (2016) |
| Global & Cross-Cultural | Samiee et al. (2011), Kalaignanam and Varadarajan (2012), Kumar, Sunder, and Ramaseshan (2011), Nijssen and Herk (2009), Öberg (2014), Samaha et al. (2014), Sichtmann and Von (2010) |
| Loyalty Programs | Ashley, Noble, Donthu, and Lemon (2011), Bagchi and Li (2010), Drèze and Nunes (2008), Beck et al. (2015), Kumar, Sharma, Shah, and Rajan (2013), Schmitt, Skiera, and Van den Bulte (2011), Liu and Yang (2009), Liu (2007), Wang, Lewis, Cryder, and Sprigg (2016), Steinhoff and Palmatier (2016), Watson, Beck, Henderson, and Palmatier (2015), Evanschitzky et al. (2012), Melancon et al. (2011), Daryanto, de Ruyter, Wetzels, and Patterson (2010), Meyer-Waarden and Benavent (2009), Brashear-Alejandro, Kang, and Groza (2016), Mimouni-Chaabane and Volle (2010), Dorotic, Verhoef, Fok, and Bijmolt (2014), Thompson and Chmura (2015), Leenheer et al. (2007), Henderson, Beck, and Palmatier (2011) |

A few research papers published on CRM covered the social media aspect of it as well. Considering the technological changes and changing consumer behavior in terms of communicating, acquiring information, and purchasing, most organizations are spending a considerable amount of money on social media platforms to engage with customers. Trainor et al. (2014), in their research, empirically proved that the social media capabilities of an organization can help meet customer needs. Their study also revealed that IT and social media alone cannot be the only measure for serving or engaging with customers; instead they must act as facilitators. Customer-centric management systems, if adopted in conjunction with social media, can yield better results for the organization. There are a very few research papers on pricing and segmentation, and one research paper each on customer lifetime value (CLV) and data mining and analytics. The entire bibliography of subject headings is shown in Table 1.

### *Distribution of articles by journal*

Figure 3 shows the classification of articles by journal. Of the 10 journals chosen for this review, *Journal of the Academy of Marketing Science* had the maximum number
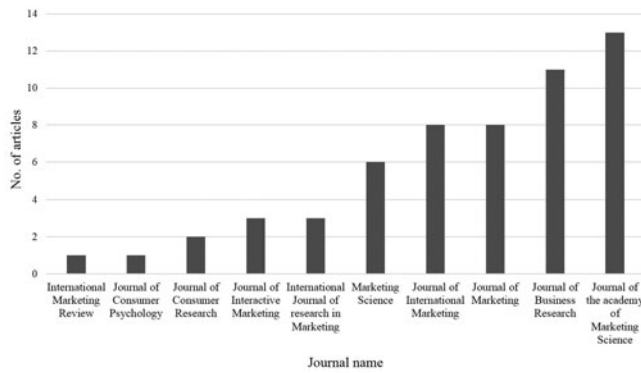
**Figure 3.** Distribution of articles by journals.

of research articles published on CRM. Nearly 23% of the total CRM research papers were published in this journal. It was followed by *Journal of Business Research*, which contained 20% of articles published on CRM. Five are bimonthly journals, four are published every four months, and one is a monthly journal. More than 70% of the research papers were published in four journals, namely *Journal of the Academy of Marketing Science, Journal of Business Research, Journal of International Marketing*, and *Journal of Marketing. International Marketing Review* and *Journal of Consumer Psychology* had the minimum number of articles on CRM, with each containing only one over a period of 10 years. From this review, it can be concluded that an average of six research papers on CRM are published in the top 10 marketing journals, as shown in Table 2.

## Classification on the basis of research type

Figure 4 shows the distribution of articles by research type. Once the research papers on CRM were identified, each was coded on the basis of type of research done. Research can be classified into various types: quantitative vs. qualitative, empirical vs. conceptual, applied vs. fundamental, cross-sectional vs. longitudinal. For the purpose of this literature review, the research papers have been classified into two types: empirical papers and conceptual papers.

**Table 2.** Year-wise classification of CRM articles in journals.

| Journal Name | 2016 | 2015 | 2014 | 2013 | 2012 | 2011 | 2010 | 2009 | 2008 | 2007 |
|---|---|---|---|---|---|---|---|---|---|---|
| *Journal of Consumer Research* | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 1 | 0 | 0 |
| *Journal of International Marketing* | 0 | 3 | 0 | 1 | 0 | 2 | 1 | 1 | 0 | 0 |
| *Journal of Marketing* | 0 | 1 | 2 | 0 | 0 | 1 | 0 | 3 | 0 | 1 |
| *Marketing Science* | 2 | 0 | 0 | 0 | 0 | 1 | 1 | 0 | 2 | 0 |
| *Journal of the Academy of Marketing Science* | 2 | 1 | 1 | 1 | 2 | 2 | 2 | 1 | 1 | 0 |
| *Journal of Business Research* | 1 | 1 | 3 | 1 | 0 | 1 | 2 | 1 | 1 | 0 |
| *Journal of Interactive Marketing* | 0 | 0 | 0 | 2 | 0 | 0 | 0 | 1 | 0 | 0 |
| *International Journal of Research in Marketing* | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 2 |
| *International Marketing Review* | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| *Journal of Consumer Psychology* | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 |
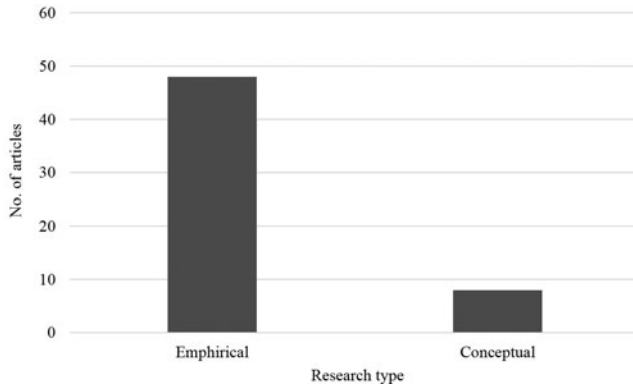
**Figure 4.** Distribution of articles by research type.

Empirical research is data-based. research, which is capable of verification by either experiment or observation (Kothari, 2004). It is also known as experimental research. On the other hand, conceptual research relies on existing literature and theory. It can be in the form of literature classification or the use of existing literature to suggest some framework or propositions. A hybrid form of research uses both empirical and conceptual methods to fulfill objectives. A total of 86% of the CRM literature in the top 10 marketing journals was dedicated to empirical research studies. The remaining 14% were conceptual research papers. Most of the empirical papers conducted surveys to gather data, while some used observational data to empirically test their framed hypotheses. The conceptual papers stated various propositions supported by previous studies and existing literature. Some of the conceptual papers also reviewed and classified the existing literature. The classification results show that researchers and academicians use empirical research methods extensively for their research and publications.
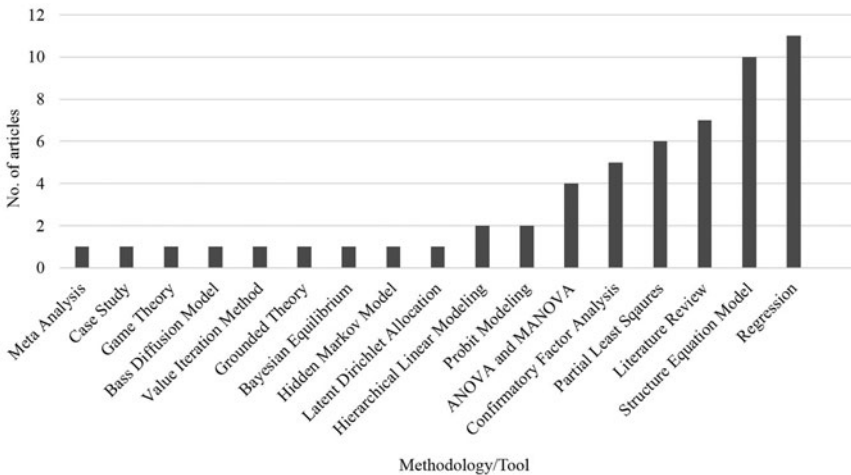


**Figure 5.** Distribution of articles by tools used

### Classification by tools used for analysis

As stated earlier, most research papers on CRM are empirical in nature; therefore, various tools are used in these identified papers for analysis of data. The analysis of data is required to find out the patterns and interrelationships in order to draw some meaningful and significant conclusions. All of the research papers were classified on the basis of tools used for analysis of data (Figure 5). The most widely used tool in these papers is regression (20%). Regression is a statistical technique which is used to find relationships between two or more variables. Researchers have used varied types of regressions in their studies in these research papers. The various regressions types are bivariate regression, multiple regression, multinomial logistic regression, and meta-regression. Some authors used regression modeling to develop a framework based on their empirical research. All of these multivariate analyses are being used very widely and often these days, as a result of the rapid and advanced development computational facilities and software (Kothari, 2004). Multivariate analysis can analyze more than two variables on the given data set, thus enhancing the scope of determining interrelationships between the various variables.

Regression is followed by the structure equation modeling (SEM) technique, which was deployed by 18% of the research papers. SEM usually follows a two-stage process. In the first stage of SEM, a measurement model is specified and fit. In its second stage, a structural model is fit to the data (Trainor, Andzulis, Rapp, & Agnihotri, 2014). SEM is often a visual path diagramming interrelationships between various factors. SEM provides a very convenient framework and it includes various other methods of statistical analysis, such as regression analysis, factor analysis, canonical correlation, and discriminant analysis (Hox & Bechgar, 2007). A total of 12.5% of the research papers on CRM used a literature review, followed by a partial least squares (PLS) method (10.7%). PLS is a very widely used method of analysis because it uses minimal demands of the measurement scales. This method can be used for theory confirmation and to suggest where relationships might or might not exist, along with suggesting propositions for later testing (Chin, 1998).

Confirmatory factor analysis (CFA) is used in 9% of the research papers. CFA is done to verify the factor structure of a set of data or observations and is used to confirm the existing construct structure (Melancon, Noble, & Noble, 2011). A total of 7% of the research papers deployed ANOVA and MANOVA as an analysis technique for their data and observations. As per Harnett et al. (1975), "The essence of ANOVA is that the total amount of variation in a set of data is broken down into two types, that amount which can be attributed to chance and that amount which can be attributed to specified causes." Through ANOVA, a researcher can investigate any number of factors which are said to have influenced the dependent variable (Kothari, 2004).

A few studies used Probit modeling and hierarchical linear modeling (HLM) to analyze their research data. These both constitute 3.5% each of the total tools used in these CRM research papers. A HLM is a complex form of ordinary least square regression which analyzes variance in the outcome variables, when the predictor

variables are at varying hierarchical levels. The hierarchical linear models are also called multilevel models, random effects models, and mixed models (McCoach, 2010). The rest of the tools used form 1.7% each of the total analysis tools used. These tools are game theory, meta-analysis, case study, Bass diffusion model, value iteration method, grounded theory, Bayesian equilibrium, Hidden Markov Model, and Latent Dirichlet Allocation (LDA). "LDA is a generative probabilistic model for discrete data and is a three level Bayesian model where each item of a collection is modeled as a finite mixture over an underlying set of topics" (Blei, Ng, & Jordan, 2003). It allows sets of observation to be explained by unexplained groups. Verma, Sharma, and Sheth (2016) used extensive meta-analysis to study the antecedents and mediators of CRM in online retailing. They suggested a model of antecedents of CRM in online retailing using 131 relationship dyads.

## Research implications and conclusion

CRM research may have received attention from researchers several decades ago, but the concept of repeat purchase, customer trust, and loyalty are not new concepts to trading or marketing. A customer coming for repeat purchases has always been a goal during all eras of trading. This article identified CRM literature published in top 10 marketing journals worldwide and then classified them using different parameters, such as year of publication, journal in which they were published, key topics and themes, research types, and tools used for analysis. It provides an extensive bibliography (Table 1) of the CRM literature over a specific period. The classification presented in this article leads to several implication and conclusions, which are as follows:

- It can be seen from this study that out of a total number of research papers/articles published in these selected journals, a small percentage of articles have been published on CRM. The total count of articles on varied aspects of CRM has been 56 in 10 journals which are published once in either two or three months over the period of 10 years. CRM is being used extensively by many organizations across the globe to gather data about customers in order to serve them better, but research work on CRM is not up to that scale of popularity and usage.
- CRM research is mostly focused on loyalty programs. It can be very evidently seen from this study that the maximum number of research articles are written about loyalty programs. A total of 38% of the research papers on CRM were published on loyalty/reward programs. This finding is different from the findings of Ngai (2005), who reviewed research papers for a decade from 1992 to 2002 to find out that the maximum number of articles that were published were related to information technology (IT) or information systems (IS). It is evident from this study that for most of the organizations, loyalty programs seem to be the major constituent of their CRM strategy. Marketers have been using this strategy in many industries and sectors under the umbrella of CRM. No other strategy/activity has been so extensively reflected in any of the research papers

reviewed for this study. There is a need for researchers and marketers to devise some novel methods to encourage customers to repurchase and to support customer retention in order to build long-term relationships.

- One of the major findings of this literature review is that a majority of research studies on CRM are empirical studies. In all, 86% of the total CRM studies used empirical research methods. These studies deployed surveys, interviews, or observational techniques for collecting data, and then used various methods for analysis of the data. CRM studies lack theory building and conceptual research. Researchers, practitioners, and academicians in the field of CRM must work on building basic theories, as only 14% of the total CRM articles published were based on conceptual research. Quantitative studies are critical, as they maintain objectivity in research, but qualitative studies should also be carried out for better insights using grounded theory or other allied techniques (Maggon & Chaudhry, 2015). Only one research paper of the total 56 used grounded theory to develop the constructs and framework.

- CRM involves collection, analysis, and storage of huge amounts of data. There were no articles related to privacy and security of that data. As mentioned in an in-depth review done by Ngai (2005) of 205 articles published over a period of 10 years on CRM, there were very few articles pertaining to the subject of privacy. In this current review, none of the articles were written on privacy and security issues about such huge data. This is a concern for consumers, who are asked to reveal their personal information to organizations when they either make a purchase or intend to purchase, and who are worried about the way organizations use information in CRM and other allied systems (Fletcher, 2003). A study by International Data Corporation found that many potential customers have either deferred purchase from websites or have left websites because of privacy concerns (Peppers & Peppers, 2000). Keeping in view the privacy concerns of consumers and considering that the basis of CRM is data, there is a need to study these privacy concerns of consumers with regard to CRM in great depth. At this moment, research about privacy concerns is a neglected domain and merits more focus.

- Over the past few years, there has been a rise in the number and usage of social media platforms by both organizations and customers. The customer, therefore, is no longer passive, but is very active in his or her relationship with the organization. The customer has more power in terms of acquiring information and communicating with a large network of people, expressing his/her views about the organization and the products/services used and experienced (Malthouse, Haenlein, Skiera, Wege, & Zhang, 2013). Merely four articles out of the total 56 were published on social and online CRM. Although organizations are using social CRM, in conjunction with traditional ways of building relationships with customers, the research studies do not reflect this current usage.

This literature review is an attempt to assimilate and synthesize the CRM literature published over a period of 10 years starting from 2007. Academicians, researchers, and practitioners can use this research to expand their knowledge of

most research areas and tools used in CRM analysis. This research can also be joined with previous literature reviews done by Ngai (2005) and Wahlberg et al. (2009) to get a comprehensive and detailed view of CRM research from 1992 to 2016.

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