

## **From Customer Relationship to Customer Engagement via Customer Experience - Exploring the changing paradigms in customer-centricity by the firm**

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*Customer Relationship Management (CRM) attracted the attention of both academia and industry as the importance of customer loyalty and Customer Lifetime Value (CLV) were realized against the backdrop of hyper competition and the increasing choices for customers. Both manufacturing and service sector firms across the world have launched many initiatives like customer affinity programs and customer loyalty programs in order to retain customers.*

*Currently, leading firms are moving ahead with initiatives to improve customer engagement. From the academic perspective the definition of customer engagement is fractured. For example several authors have argued that engagement can be related to a wide spectrum of factors like experiential, attitudinal and behavioural factors, that represent different stages of an engagement process (Maslowska et al. 2016). Most scholars (e.g. Verhoef et al. 2010; Bijmolt et al. 2010, Jaakkola and Alexander 2014; Verleye et al. 2014) concur with van Doorn et al. (2010) and the Marketing Science Institute ( Marketing Science Institute 2010 ) that customer engagement only involves behaviour that extends beyond transactions, and thus beyond purchase. Progress in Artificial Intelligence (AI) offers firms a multitude of opportunities to more closely connect with customers through intelligent agents(e.g.wearabletechnology,theinternetofthings), learn about customer dispositions to engage(e.g.sentimentanalysis)and their connectedness to other actors(e.g.customers, family and friends,other brands)-Heidi Winklhofer (University of Nottingham).*

*It is in this context that an examination of the theoretical and practical implications of Customer Experience makes sense from both the academic and industry perspectives.*

**1.Introduction:**

The concept of Relationship Marketing (RM) has evolved along with the shifts in business landscapes throughout history. The development of relationship marketing as a concept, marks a pivotal shift from a transactional relationship to emphasis building enduring connections between a business and its customer. The focus has shifted from “products and firms” to “people, organizations, and the social processes” (Webster, 1992).

The late 19th to early 20th century witnessed the rise of industrialization and mass production, which laid the foundation for a production-centric approach. However, as the 20th century progressed, the emergence of consumerism highlighted the significance of understanding customer needs and preferences.

In the 1990s, pivotal contributions from scholars and practitioners shaped the modern concept of relationship marketing. The relationship marketing strategy continuum illustrated the spectrum of customer interactions, from transactions to profound relationships (Gronroos, 1995; Sheth and Parvatiyar, 1995). The relationship marketing ladder expounded on various customer relationship levels (Payne 1994)

In the 21st century, relationship marketing focuses on comprehensive customer experiences. This new landscape emphasized touchpoints throughout the customer journey—before, during, and after purchase—as opportunities to foster meaningful associations (Bascur et al., 2018; Towers and Towers, 2022).

The origin of relationship marketing thus emerges as a response to the changing dynamics of marketing philosophy (Sheth and Parvatiyar, 1995). It reflects the progression from a production-oriented mindset to a customer-centric approach. Relationship marketing underscores the significance of nurturing long-term associations, appreciating individual customer preferences, and co-creating value.

However, despite the fact that RM as a concept formally developed post 1950, the core principles have been in usage since long before (Tadajewski and Saren, 2009). Some notable comments from before 1950 are as follows:

In the words of Orange and McBain (1911), repeat purchasing lowers the costs associated with selling. This statement emphasizes on the importance of establishing a reciprocal relationship between a business and its customer even though the perspective here is not that of customer engagement but that of maximization of profit and lowering of costs. This is further elaborated by Moriarty (1923) as:

*“The great function of retail advertising in direct relation to customers is not to gain new customers, but to hold old customers. It is a well-known thesis of business that the first sale is more apt to be a loss than a gain—that is, that the time and energy and money required to get the customer to come into the store and make his first purchase is more than the store makes through this sale ... it is evident that the regular customer is the store’s real gain and this alone should make evident that the real function of advertising is to develop regular customers and retain them.”*

Leigh (1921) remarked:

*“The customer keeps my business solvent; he makes possible every possible enlargement of my business; he is my never failing ‘meal ticket’.”*

Burt (1938) emphasized that for achieving a well anchored customer base, a choreography of business-customer interaction was essential, as “it only took a single tactless remark by a salesperson” to altercate “the customer’s buying habits with reference to that particular store” Although the above views largely focus on profit-making, they highlighted the importance of repeat customers in the process and in doing so, laid the foundation for what we now call Relationship Marketing.

The major question here is how has the paradigm of customer-centricity evolved from transactional Customer Relationship Management (CRM) to holistic Customer Engagement, and what is the role of Customer Experience Management (CXM) in facilitating this transition?

## **2.From Relationship Management(RM) to Customer Relationship Management(CRM):**

Customer Relationship Management (CRM) does not have one agreed upon definition in the literature. Its meaning changes depending on the context of usage. From the management perspective, CRM is referred to as an integrated approach to identifying, acquiring, and retaining customer (Ellatif, 2007) whereas from an information technology perspective, it is referred to as the tools or system design which supports the relationship strategies and activities such as identifying, acquiring, and retaining customers (Chen and Popovich, 2003). However, even with a lack of consensus upon the constituents of CRM, it is accepted as a business strategy that harnesses the power of technology to bind all aspects of a company’s business in order to build and maintain long-term customer relationship and customer loyalty (Wahab and Ali 2010).

The transition from RM to CRM represents a refined and technology-driven evolution in managing customer interactions. While Relationship Marketing emphasizes the importance of building and nurturing enduring customer relationships, CRM takes this concept a step further by utilizing technology to streamline, personalize, and optimize these relationships (Wahab and Ali 2010).

Relationship Marketing centers on understanding customer needs, delivering value, and fostering long-term connections. It recognizes that sustained customer loyalty and repeat business are achieved through meaningful engagement, open communication, and personalized experiences. This approach is characterized by a holistic view of customers, focusing on their preferences and building trust over time.

CRM is a strategic approach that leverages technology to manage, analyze, and optimize interactions with customers throughout their lifecycle. It involves the use of software systems to collect, store, and analyze customer data, enabling businesses to make informed decisions and provide tailored experiences. CRM systems allow for efficient management of customer interactions, sales, marketing campaigns, and customer support.

The transition from Relationship Marketing (RM) to CRM seems like a linear technological evolution, yet academic discourse reveals a significant tension between the two constructs. While RM is rooted in a strategic philosophy of long-term value creation, the practical implementation of CRM often created a schism between 'CRM as a philosophy' and 'CRM as a technology.'

Ideally, CRM enhances a business's ability to deliver on the promises of Relationship Marketing. However, early iterations of CRM frequently prioritized operational efficiency and data harvesting over the relational nuances espoused by RM. This over-reliance on software often led to organizational failures, where firms possessed sophisticated tools to track transactions but lacked the cultural orientation to foster genuine relationships. Thus, the shift to CRM was not just an upgrade, but a complex struggle to align technological capability with organizational intent.

### **3.Types of CRM:**

Customer Relationship Management (CRM) can be categorized into several types based on its focus and functionality. Here are the main types of CRM:

**3.1.Operational CRM:**

Operational CRM focuses on streamlining and improving various customer-facing processes. It includes tools and systems that manage and automate sales, marketing, and customer service activities. This type of CRM aims to enhance efficiency and effectiveness in day-to-day interactions with customers. Examples include sales force automation (SFA) software, marketing automation tools, and contact center solutions. (Dyche, 2002; Lun et al., 2008; Raisinghani et al., 2005)

**3.2.Analytical CRM:**

Analytical CRM involves analyzing customer data and interactions to gain insights into customer behavior, preferences, and trends. This type of CRM uses data mining, predictive analytics, and business intelligence tools to understand customer segments, identify opportunities, and make informed decisions. Analytical CRM helps businesses create targeted marketing campaigns, optimize sales strategies, and improve customer retention. (Dyche, 2002; Gefen & Ridings, 2002; Lun et al., 2008; Zhang et al., 2006)

**3.3.Collaborative CRM:**

Collaborative CRM emphasizes enhancing collaboration and communication among different departments within an organization to improve customer interactions. It facilitates information sharing and coordination between sales, marketing, customer service, and other relevant teams. This type of CRM focuses on ensuring a seamless customer experience by providing a unified view of customer interactions across the organization (Al-Homery et al., 2019).

These different types of CRM cater to various aspects of customer interactions and business processes, allowing organizations to choose the most relevant type or a combination of types based on their goals and needs.

**4.Role of technology in CRM:**

In the modern business landscape,as businesses strive to understand and engage with their customers more effectively,technology has emerged as an enabler, reshaping the way organizations manage and nurture their customer interactions.

**4.1.Customer Insights and Data Collection:**

Various digital touch-points such as websites, social media, mobile apps, and email campaigns, allow businesses to gather tones of information about their customers' preferences, behaviors, and interactions. The businesses also get a comprehensive view of the customers' journey through the usage of Customer data platforms (CDPs) and data analytics tools that enable the consolidation and analysis of the diverse data streams (Taleb et al 2020). These exhaustive insights empower organizations to tailor their offerings and strategies to align with customer expectations. (Anshari et al., 2019)

#### **4.2. Personalization of Customer Experiences:**

By harnessing customer data, businesses can deliver tailor-made interactions and offerings that resonate with individual preferences. Customer segmentation and targeting become more precise, enabling the creation of hyper-targeted marketing campaigns. Artificial intelligence (AI) and machine learning algorithms analyze customer behaviors in real time, allowing organizations to recommend products, suggest content, and provide customer support that feels customized to each individual. (Pearson, 2020)

#### **4.3. Automation and Efficiency:**

Automation lies at the heart of modern CRM systems, streamlining routine tasks and enabling efficient customer interactions (Rigby et al., 2002). Chatbots and virtual assistants handle customer inquiries around the clock, ensuring immediate responses to queries and issues. Automated workflows facilitate timely follow-ups, lead nurturing, and sales processes. This increased efficiency not only enhances customer satisfaction but also frees up valuable human resources to focus on high-value tasks that require human expertise.

#### **4.4. Data-Driven Decision-Making:**

The infusion of technology in CRM fosters data-driven decision-making at all levels of the organization. Advanced analytics tools enable businesses to derive actionable insights from complex datasets. Leaders can assess customer trends, measure campaign effectiveness, and identify areas for improvement. The insights gleaned from data empower organizations to make informed choices that drive customer-centric strategies and optimize resource allocation. (Kotler and Keller, 2017)

**4.5.Omnichannel Engagement:**

Technology has facilitated the transition from multichannel to omnichannel engagement, enabling seamless interactions across various touch-points (Verhoef et al 2015). Customers expect consistent experiences whether they engage with a brand through social media, email, phone, or in-store visits. CRM systems integrate data from these disparate channels, ensuring that each interaction is informed by the customer's history and preferences. This continuity of experience enhances customer satisfaction and loyalty.

**4.6.Enhanced Customer Service:**

Technology-driven CRM has revolutionized customer service by enabling efficient issue resolution and support. Customer service representatives armed with CRM systems have access to comprehensive customer profiles, enabling them to address inquiries more effectively (Hassan et al., 2015; Anshari et al., 2019). Additionally, technology facilitates self-service options, allowing customers to find solutions independently through knowledge bases and FAQs. This proactive approach to customer service enhances satisfaction and reduces response times.

Technology in CRM has redefined how businesses connect with their customers. From data collection and personalized experiences to automation and data-driven decision-making, technology empowers organizations to foster stronger customer relationships. As technology continues to evolve, businesses must leverage its capabilities to create meaningful, seamless, and enduring interactions that drive customer loyalty and contribute to overall business success.

**4.7.Challenges in the implementation of CRM**

**The Personalization-Privacy Paradox:** A central tension in modern CRM is the balance between customization and intrusion. While tailoring strategies to resonate with individual preferences is theoretically posited to enhance customer lifetime value, scholars warn against the risks of over-personalization(Sutanto et al., 2013). Consequently, the implementation challenge lies not just in technical customization, but in maintaining a "respect for customer boundaries" to avoid eroding trust.

**Data Ethics and Consumer Empowerment:** Closely linked to personalization is the challenge of data transparency. The effectiveness of CRM systems relies heavily on data collection; however, the lack of transparency regarding how this data is utilized can sever the

relationship the firm aims to build. Consumer empowerment, related to knowledge of utilization of their data, is essential for ethical compliance and trust-building. Hence, adherence to data protection regulations is not merely a legal constraint but a fundamental component of relationship maintenance(Lacey, 2019).

Organizational Integration vs. Silos: The shift from transactional marketing to relational marketing requires a holistic knowledge of the consumer. Yet, the data is always fragmented. Successful implementation of CRM is reliant on the integration of CRM systems across diverse organizational processes. However, the presence of departmental silos often prevents the collaboration needed to enhance the customer experience. The challenge for firms is to move beyond a "one-size-fits-all" approach to a unified strategy that harmonizes sales, marketing, and support data.

### **5. Customer Experience Management (CXM) – A paradigm Shift from CRM:**

In today's hyper-connected and customer-centric business landscape, the limitations of CRM have given way to a more comprehensive approach called Customer Experience Management (CXM). While CRM focuses on managing interactions and relationships, CXM encompasses a broader spectrum that centers on creating seamless and meaningful experiences at every touchpoint of the customer journey(Verhoef et al., 2010). But this is not devoid of debate. While some scholars view CXM as merely an extension of CRM—an 'expanded CRM' designed to capture more data points—others argue it represents a distinct phenomenological shift away from the firm-centric view of the customer(AlHarbi et al., 2016; Saarijärvi et al., 2013).

The friction driving this paradigm shift stems from CRM's historical tendency to reduce customers to transactional data points. It primarily focused on capturing customer data, automating processes, and improving customer service (Pine & Gilmore, 1999). Although CRM brought valuable insights and efficiencies, it often treated customers as data points and transactions, failing to capture the holistic nature of customer interactions. This led to a gap between customer expectations and the experiences they received.

CXM represents a paradigm shift from the transactional nature of CRM to a more holistic and customer-centric approach. It encompasses not only interactions but also emotions, perceptions, and the overall sentiment that customers associate with a brand (Meyer &



Schwager, 2007). As a result, CXM transcends individual transactions to encompass the entire relationship a customer has with a brand(Homburg et al., 2017).

Transitioning from CRM to CXM presents challenges, including the need for a cultural shift within organizations, data integration across touchpoints, and a deeper understanding of customer emotions. However, businesses can start by mapping customer journeys, gathering feedback, using advanced analytics to understand sentiment, and leveraging technology to create personalized and consistent experiences.

## **6. The Evolution of Artificial Intelligence (AI) in CRM and CXM**

Artificial Intelligence (AI), is widely understood as bestowing human intelligence in machines. It is an interdisciplinary branch of computer science that aims at developing machines capable of performing tasks that would normally require human intelligence. The integration of Artificial Intelligence (AI) into Customer Relationship Management (CRM) and Customer Experience Management (CXM) systems has revolutionized customer interactions and engagement strategies.

AI-powered chat bots provide instant support, while predictive analytics enhance personalized recommendations. Emotional AI enables empathetic interactions, leading to customer satisfaction and loyalty. Hyper-personalization and anticipatory AI elevate customer experiences, positioning businesses for a customer-centric future.

By embracing AI-driven personalization, emotional intelligence, and ethical considerations, businesses can reshape customer interactions and create meaningful connections. As AI continues to evolve, the relationship between businesses and customers will undergo further evolution, marked by innovative and human-centric experiences. However, this transition toward algorithmic management introduces significant theoretical and ethical tensions that are considered the pitfalls of AI integration. While the intent is anticipatory engagement, the granular collection of data required to fuel these predictions risks crossing the threshold into surveillance. The capacity for AI to predict behavior can create a sense of intrusion.

Furthermore, the algorithm is trained on historical data that may inadvertently create biases, leading to discriminatory service provision or exclusion. This is a direct contradiction to the inclusivity promised by modern relationship marketing. Additionally, the deployment of

"Emotional AI" raises the risk of emotional overreach, where synthetic empathy falls into the uncanny valley, alienating customers rather than bonding them.

Consequently, the challenge for the next generation of CXM is not merely technical deployment, but the management of these paradoxes to ensure that algorithmic efficiency does not erode the human trust essential to genuine customer relationships.

## **7. The way forward- Customer Engagement:**

In an era defined by rapid technological advancement and evolving customer expectations, the trajectories of Customer Relationship Management (CRM) and Customer Experience Management (CXM) are at a crossroads. As businesses strive to forge stronger connections with customers, the way forward for CRM and CXM presents an exciting journey laden with transformative potential. This article delves into the strategies that can shape the future of CRM and CXM, exploring their profound implications on customer relationships and the broader business landscape.

**Embracing a Unified Approach:** The future of CRM and CXM lies in adopting a unified approach that merges data-driven insights with emotional intelligence. By seamlessly integrating customer data, interactions, and emotions, businesses can create a 360-degree view of each customer. This enables personalized engagements that resonate on both rational and emotional levels, fostering deeper connections (Homburg et al., 2017).

**Holistic Customer Journey Mapping:** Mapping the customer journey across touchpoints will be pivotal. This entails understanding the customer's end-to-end experience, identifying pain points, and orchestrating interactions that create consistent and seamless engagement. Holistic journey mapping empowers businesses to address customer needs proactively and enhance satisfaction (Lemon & Verhoef, 2016).

**Leveraging Technology for Hyper-Personalization:** Technology, especially AI and machine learning, will propel hyper-personalization to new heights. Businesses will leverage real-time data to predict customer preferences and behavior, enabling tailored interactions and recommendations. This level of personalization elevates customer experiences and engenders brand loyalty (Verhoef et al., 2017).

**Ethical AI and Data Privacy:** As AI becomes omnipresent in CRM and CXM, ethics will play a central role. Organizations must prioritize ethical AI that respects customer privacy, avoids discrimination, and transparently communicates AI-driven decisions. Upholding ethical

standards safeguards customer trust and mitigates potential risks (Mullainathan and Obermeyer, 2017).

**From Transactional to Emotional Connections:** The transition from CRM to CXM signifies a shift from transactional relationships to emotional connections. Businesses will recognize the importance of emotional engagement, aiming to evoke positive emotions at every interaction. These emotional connections are catalysts for customer loyalty and advocacy (Meyer & Schwager, 2007).

**Cultivating Agile Responses:** Agility will be crucial in the evolving landscape. As customer preferences change rapidly, businesses must be agile in adapting their strategies. Flexible systems, responsive customer service, and the ability to pivot based on insights will set apart successful organizations (Verhoef et al., 2010).

The trajectory from CRM to CXM signifies a dynamic evolution that promises to revolutionize customer relationships and the business landscape. By embracing a unified approach, leveraging technology, prioritizing ethics, and cultivating emotional connections, businesses can navigate this transformation successfully. As CXM becomes the cornerstone of customer engagement, organizations that master its principles will not only thrive in the competitive arena but also contribute to shaping a future where customer-centricity reigns supreme.

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