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Towards a holistic perspective**

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*Abstract*

*The application of information technology (IT) to marketing through customer relationship management (CRM) software is growing rapidly, but the risk of failure remains high. We argue that research in CRM implementation success should focus more on human-centred issues. In this study we introduce a conceptual framework for a holistic view of humans in CRM and apply the framework to earlier research on CRM implementation. The results indicate that in most CRM approaches the prevailing conception of humans is monistic. The human being is seen as consisting of only one basic mode of being in that humans are conceptualized as objects without any mental and social qualities. We suggest that a more holistic approach to human beings as users of a CRM system would benefit CRM implementation.*

Keywords: Human-centredness; CRM implementation; IS success

## INTRODUCTION

At present, customer relationship management (CRM) is increasingly geared towards the development and utilization of information systems (IS), creating a new domain of interest regarding the human-centred use and development of IS. The concept of CRM is based on the relationship marketing paradigm according to which marketing is to establish, maintain and enhance relationships with customers and other partners, at a profit, so that the objectives of the parties involved are met. This is achieved by a mutual exchange and fulfilment of promises (Grönroos 1997). CRM extends the scope of relationship marketing by utilizing IS to take over the

labour-intensive aspects, thereby making it feasible for a wide range of very different customers. Fundamentally, CRM is a simple, intuitively appealing concept: attract new customers, know them well, give them outstanding service, and anticipate their needs and wants (Goodhue et al. 2002). However, according to many studies (Peppard 2000; Yu 2001; Bose 2002; Croteau and Li 2003; Fjermestad and Romano 2003) CRM may fail to produce the expected results. In the study by The Data Warehousing Institute (TDWI Industry Study 2000, p. 13) 41 percent of the organizations surveyed had been either "experiencing difficulties" or suffered a "potential flop". Furthermore, it has been shown that 55-75% of sales force automation (SFA) projects may fail (Honeycutt et al. 2005). Honeycutt et al. (2005) conclude that the benefits firms pursue by implementing SFA, are poorly planned, communicated and evaluated and/or are incongruent with the perceptions and goals of salespersons. Little is known about how human issues connect to the success of CRM implementations (Boulding et al. 2005). Payne and Frow (2005, p. 167) emphasize human issues as priority area for further research: "CRM can fail when a limited number of employees are committed to the initiative; thus, employee engagement and change management are essential issues in CRM implementation". Recently human factors have been included in models investigating CRM implementation success (Mendoza et al. 2007), yet research into the role of the human being in CRM has been predominantly quantitative and concentrated on the set of tasks of humans (Moncrief et al. 2006), and not on the qualities of the human being in doing her work. We argue that this is an area worthy of scholarly attention and our study is the first attempt to conceptually investigate how the qualities of the human being emerge in the existing CRM literature and how humans are considered crucial to successful CRM implementation. From a managerial point of view our study contributes to the understanding of the role and activities of humans in CRM implementation and presents human qualities as success factors.

       CRM is defined as any application or initiative designed to help an organization optimize interactions with customers, suppliers, or prospects via one or more touch points - such as call centre, salesperson, distributor, store, branch office, Web, or e-mail - for the purpose of acquiring and retaining customers, or to carry out up selling and cross-selling to customers (see Goodhue et al. 2002). CRM takes a broad view of a company's customers by including both present and prospective customers as well as trading partners in the supply chain. To optimize interactions with these customers, it is necessary to collect, store, and manage data on every interaction, whether the data comes from a salesperson, a call centre, or the Web. CRM may include many applications, performing both analytical and operational functions (Goodhue et al. 2002). On the analytical side, a data warehouse typically maintains historical data supporting generic applications, such as reporting, queries, online analytical processing (OLAP), and data mining, as well as specific applications, such as campaign management, churn analysis, propensity scoring, and customer profitability analysis. On the operational side, data must be captured, integrated and stored from all inbound touch points, including the Web, call centres, stores, field sales, and ATMs. We focus on the users of operational CRM applications and sales force automation (SFA) applications in particular. Sales-oriented CRM applications refer to "the use of computer hardware, software, and telecommunications devices by salespersons in their selling and administrative activities" (Morgan and Inks 2001, p. 463). In our study the concept "user" refers to salespersons using IT in their selling and administrative activities. Furthermore, the concept user is used if we refer to a particular CRM role; we use the concept human being to refer to humans in general or collectively. We do acknowledge that our decision to study salespersons excludes many other user groups, such as the part-time marketers (Gummesson 1990), who in contrast to the full-time marketers (salespersons) do not belong to the marketing or sales department. We have also omitted helpdesk and call centre employees in an organization's service processes (Grönroos 2000). Accordingly, to increase the internal and external validity of our conceptual investigation, we decided to focus on one CRM user role, that of a salesperson.

Vast improvements in information and communication available to the individual salesperson through the proliferation of such innovations as laptop computers, cellular phones, and Internet have provided strategic advances affecting the everyday jobs of salespersons (Moncrief et al. 2006). To form a useful view of customers, companies should be able to portray customers in a way that allows collecting and utilising customer data in a holistic manner. To know what the customers are thinking, how they are behaving, and their relevant needs, a human-centred framework for understanding customers is needed. A skilled and motivated salesperson, who when performing her customer interaction tasks is willing and committed to rely on advanced IT in performing her job, would seem ideal for the required tasks: the user, the CRM systems developer and the CRM manager. It would be especially important for the salesperson to understand those human features conducive to selling the products; in particular, to understanding humans' behavioural features regarding their consumption habits (e.g., Chen and Wells 1999). For example, Mitchell & MacNulty (1981) report that humans tend to change as consumers. These changes may be better anticipated if the basic qualities of users guide the CRM persons' reflections. Hoffman and Novak (1996), for instance, argue that it is important to understand humans' spontaneous and mood-related online behaviour in addition to more normative and goal-directed behaviour involved in purchasing decisions.

It has been suggested that CRM implementation will succeed only after the organization and its processes - job descriptions, performance measures, compensation systems, and training programmes have been restructured in order to better meet customer's needs (Rigby et al. 2002). Furthermore, in order to "motivate" users to accept the introduction of CRM, top management support (Croteau and Li 2003) and commitment to change (Chen and Popovich 2003) have been mentioned as success factors. According to Chen and Popovich (2003, p. 685) "management must ensure that job evaluations, compensation programmes, and reward systems are modified on a basis that facilitate and reward customer orientation. After all, how people are measured will determine their behaviour". Corner and Hinton (2002) maintain that the user in her own right is a risk for CRM success: "salespersons are more difficult to manage as system users" (Corner and Hinton, 2002, p. 242). We argue that in these citations the perspective on humans is more oriented to the work of a manager than taking into account the qualities of human beings themselves. We define this perspective as *managerial*. Sometimes researchers (Corner and Hinton 2002; Rigby et al. 2002) have emphasised only one type of human qualities, for example, cognitive or emotional features. In Corner and Hinton (2002, p. 245) this human quality is jealousy or opportunism in the notion of "political infighting", and in Rigby et al. (2002, p. 108) this appears in the notion of "stalking, not wooing customers", i.e., a lack of sensitivity in the salesperson to the acceptable contact frequency perceived by the customer. All these examples suggest that the full potential of the human being has not been taken into account in CRM implementation success research. We argue that understanding humans solely in accordance with roles and purposes implies that humans can be defined in a given system in terms of division of labour or some other instrumental task, and thus, that humans are merely something existing in relation to particular instrumental needs and purposes (von Wright 1984, Buber 1993). In order to maintain effective and successful CRM, humans should be understood holistically. Attention should be paid to the fundamental qualities of humans with no explicit or implicit domination of the other elements, such as managerial belief systems that treat humans instrumentally. Therefore, in our study, users and their behaviour are seen in terms of indispensable human constituents, intertwining the accomplishment of instrumental roles and tasks and thus having a crucial influence on IS usage inherent in such roles and tasks.

As a research approach we use conceptual analysis as presented by Järvinen (2001). In this conceptual-analytical study we first analyse the roles and activities of the human being described in diverse operational applications of CRM. Second, we introduce a conceptual framework outlining the nature of human qualities in CRM implementation, and finally we apply

the framework as our lenses in the analysis of earlier research on CRM implementation in order to explicate the nature of the image of the human being in CRM implementation, and to make visible the variety and limitations of human-centredness in CRM. We conclude by discussing the findings and reflect on their implications.

## RESEARCH APPROACH

Concepts are crucial to theory formulation, since they establish, first, the boundaries defining a theory's domain of interest, second, the key constructs and their relationships within that domain, and third, the values or contents those constructs can assume (Järvinen 2001). To establish sound concepts, we must carry out conceptual analysis. This is especially important in new emerging domains drawing on different research disciplines with varying underlying epistemological and ontological notions. The recent research on CRM applications is a typical example of such a new research area in which concepts are borrowed from one domain to another. To establish the concept of human-centredness within the domain of CRM, we carry out a conceptual analysis with a normative orientation drawing on earlier findings in CRM research. In this way our analysis emphasises the utility aspect of the concept of human being in understanding the underlying assumptions rather than representing different interpretations of human-centredness (cf. Järvinen 2001). Our aim is to bring to the fore and discuss the nature and qualities of humans in CRM theorization. We hope that the explications of the construct will facilitate further research and serve as a better foundation for development of CRM applications.

| Research questions | Research objectives |
| --- | --- |
| 1) What is the image of the human being in the context of CRM? | 1) to explore the specific roles and activities of the human being in CRM |
| 2) What would be a suitable framework for a holistic view of humans in CRM? | 2) to develop a taxonomy relevant for understanding the nature and delineation of the human qualities in CRM implementation |
| 3) To what extent does the existing literature on CRM implementation success take human qualities into account | 3) to explicate the nature of the image of the human being in CRM implementation success, and to make the variety and limitations of human-centredness visible in CRM |

In our analysis, we set the boundaries defining a theory's domain of interest by first defining the roles and activities of the human being in CRM. Secondly, we establish the framework for outlining the nature of the human being in the context of CRM. Finally we use this framework to analyse what kinds of human qualities there are within the domain of CRM. In this way we explicate the contents that the concept of human-centredness can assume within this domain.

To achieve our research objectives we first conducted an extensive literature search. Given the difficulty of confining CRM to specific disciplines, the materials are scattered across various journals. Marketing, business and management, and IT and IS are some common academic disciplines for CRM research (Ngai 2005). Consequently, the online database of Google Scholar was searched to provide a comprehensive list of the scholarly literature on CRM implementation success. Additional motivation to utilize Google Scholar was the fact that its search results include the number of citations of the respective articles and Google Scholar lists the articles in order of relevance based on both the words used in the search descriptor and the number of citations (Google 2008). We decided to include in our analysis articles which at the time of conducting the search had accumulated more than 20 citations. As our interest was to study CRM implementation and related success factors, the literature search was based on the descriptor, "customer relationship management implementation success". The search resulted in a total of 33,000 hits. As the search logic of Google Scholar is based on both the relevance of the given search descriptor and the

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number of citations (Google 2008), we then selected from the result set the first 100 articles for further analysis. The abstract of each of the 100 articles was reviewed to eliminate those not actually related to our research objectives. Only articles published in journals were selected. Conference papers, master's theses and doctoral dissertations, textbooks and unpublished working papers were excluded, as academics and practitioners most often use journals to acquire information and disseminate findings (Ngai 2005). Moreover, as our focus was on operational CRM, we excluded papers addressing analytical CRM like databases, data warehouses, and data mining. Enterprise resource planning (ERP) emerged as a major topic in many of the articles in the result set but these were eliminated, too, as our main focus was on the firm-customer interaction not the firm's internal processes. Finally, as the number of CRM articles according to their year of publication has been shown to have increased significantly since 1999 (according to Ngai (2005) 93 per cent of the total of articles from 1992 to 2002 had been published *after* 1999), we selected only articles published in or after 2000. As a result, 17 articles were selected for closer analysis. These and their numbers of citations are listed in Table 1.

| Paper | No. of citations of the article in Google Scholar as on 19/01/2008 |
|---|---|
| Bose, R. (2002). Customer relationship management: Key components for IT success, *Industrial Management & Data Systems*, 102, 2, 89-97. | 62 |
| Bull, C. (2003). Strategic issues in customer relationship management (CRM) implementation, *Business Process Management Journal*, 9, 5, 592 – 602. | 21 |
| Campbell, A. J. (2003). Creating customer knowledge competence: managing customer relationship management programs strategically, *Industrial Marketing Management*, 32, 5, 375-383. | 46 |
| Chen, I. J. and Popovich, K. (2003). Understanding customer relationship management (CRM): People, process and technology, *Business Process Management Journal*, 9, 5, 672 – 688. | 42 |
| Colgate, M.R. and Danaher, P.J. (2000). Implementing a customer relationship strategy: The asymmetric impact of poor versus excellent execution, *Journal of the Academy of Marketing Science*, 28, 3, 375-387. | 75 |
| Corner I. and Hinton M. (2002). Customer relationship management systems: implementation risks and relationship dynamics, *Qualitative Market Research: An International Journal*, 5, 4, 239-251. | 29 |
| Gefen, D. and Ridings, C. M. (2002). Implementation team responsiveness and user evaluation of customer relationship management: A quasi-experimental design study of social exchange theory, *Journal of Management Information Systems*, 19, 1, 47 – 69. | 42 |
| Payne, A. and Frow, P. (2005). A strategic framework for customer relationship management, *Journal of Marketing*, 69 (October), 167–76. | 68 |
| Peppard, J. (2000). Customer relationship management (CRM) in financial services, *European Management Journal*, 18, 3, 312-327. | 141 |
| Plakoyiannaki E. and Tzokas, N. (2002). Customer relationship management (CRM): A capabilities portfolio perspective, *Journal of Database Marketing*, 9, 3, 228-237. | 37 |
| Reinartz, W., Krafft, M. and Hoyer W. D. (2004). The customer relationship management process: Its measurement and impact on performance, *Journal of Marketing Research*, 41, 3, 293-305. | 91 |
| Ryals, L. and Knox, S. (2001). Cross-functional issues in the implementation of relationship marketing through customer relationship management, *European Management Journal*, 19, 5, 534-542. | 71 |
| Ryals, L. and Payne, A. (2001). Customer relationship management in financial services: towards information-enabled relationship marketing, *Journal of Strategic Marketing*, 9, 3-27. | 43 |
| Speier, C. and Venkatesh, V. (2002). The hidden minefields in the adoption of sales force automation technologies, *Journal of Marketing*, 66, 3, 98-111. | 62 |
| Wilson, H., Daniel, E. and McDonald, M. (2002). Factors for success in customer relationship management (CRM) systems, *Journal of Marketing Management*, 18, 193-219. | 53 |
| Xu, Y., Yen, D. C., Lin, B. and Chou, D. C. (2002). Adopting customer relationship management technology, *Industrial Management & Data Systems*, 102, 8, 442 – 452. | 43 |
| Zablah, A. R., Bellenger, D. N. and Johnston, W. J. (2004). An evaluation of divergent perspectives on customer relationship management: Towards a common understanding of an emerging phenomenon, *Industrial Marketing Management*, 33, 475-489. | 50 |

**Table 1. List of research papers reviewed**

After collecting the set of articles for closer investigation, the full text of each article was reviewed and analysed. The analysis was carried out by first identifying aspects and topics related to roles

and activities of humans and the image of the human being. Thereafter, these human-related aspects were analysed according to the constructs of our holistic framework. In the following section we first present the image of the human being in the general context of CRM and introduce our research framework in more detail. Next we present our literature analysis in light of the research framework.


## FRAMEWORK FOR A HOLISTIC VIEW OF HUMANS IN CRM


The definition of the operational CRM (Goodhue et al. 2002) explicates some of the most common roles and activities of the human being in the CRM context: the individual as a member of the company's sales organization (e.g., a salesperson) or as a member of the service organization (e.g., a call centre employee). As stated in the Introduction section, the concept of "user" in this study refers to salespersons using IT in their selling and administrative activities. Hence, we have omitted many other user groups like part-time marketers and employees of an organization's service processes. Moncrief et al. (2006, p. 55) point out that "customer relationship focus, technology, global competition, shifting customer preferences and demands, forced downsizing, increased competitive pressure, and other factors have contributed to altering the salesperson role – what salespersons do". According to Moncrief (2006) the activities of salespersons include Internet use, working on the web, checking e-mail, learning software, entering data on a laptop, collecting database information, and presenting with laptop. However, other activities may also be supported by computer use, such as planning selling activities, checking customer inventory, and making expense reports.

In their sales roles, human beings are often seen in terms of knowledge and communication (Zablah et al. 2004; Tanner and Shipp 2005). Zablah et al. (2004) introduce knowledge and interaction management as the two major sub-processes of the CRM macro level process. This emphasises the cognitive qualities of human beings, such as knowing. Whether they can articulate it or not, salespersons possess substantial amounts of knowledge about individual customers and their needs and preferences (Zablah et al. 2004). Knowledge management is seen as a process concerned with all the activities directed towards creating and leveraging the market intelligence that firms need to build and maintain a portfolio of customer relationships maximizing organizational profitability. Here interaction refers to any instance in which two active parties with the ability to exert influence upon each other, engage in an exchange of values. Many of the essential job functions of the salesperson require communication with the customer (Tanner and Shipp 2005). Buyer-seller interactions do not exist in isolation but rather occur within the context of an ongoing relationship (Grönroos 2000). The existing CRM literature suggests that interactions should be consistent, relevant and appropriate throughout a relationship's lifecycle (Khirallah 2000; Ragins and Greco 2003). Therefore the interaction management process is heavily dependent upon the human resources of a firm. Salespersons' ability to leverage their understanding of individual customers and human behaviour often has a substantial impact on the outcome of exchange episodes (Zablah et al. 2004).

Generally the various conceptions of the human being can be seen as different combinations of two main elements: the first element refers to *the number of the basic modes of being*, and the second element to *the structure of the basic modes of being* (Figure 1). The first element is based on the research results in Rauhala (1983). Rauhala (1983, p. 19) states that it is common to distinguish between monistic, dualistic, pluralistic, and monopluralistic models of the human being. For example, *monistic conceptions* are based on the idea that the human being consists of only one basic mode of being. In general this one mode is matter. *Dualistic models*

consider that, in order to understand the human being two different modes of being must be presupposed (Rauhala 1983, p. 19). Usually these two modes of being are mind and body. Different conceptions based on a two-aspectual interpretation of the human being are quite common (Rauhala 1983, p. 19). In *pluralistic conceptions* it is presupposed that the human is actualised as many kinds of subsystems (e.g. vision, digestion, memory, and emotions), with their own structures and thus also relative independence. In this way the 'number of basic modes' is one method of categorizing different notions of the human being.

The present multidisciplinary research is often based on a pluralistic view: research on humans is focused on a certain subsystem in a particular context, for example, human information processing in requirements analysis (Barnard and May 1993), or development of trust in virtual teams (Jarvenpaa et al. 1998). A limitation of the pluralistic conceptions is the difficulty in gathering dissimilarity and evincing arguments for the human being as a whole. An attempt has been made to resolve this limitation within the *monopluralistic conceptions*, which assume that *the human being is actualised in more than two modes of being and that these modes are essentially different*. Without the simultaneous existence of all of the modes it is not possible to consider a creature as a human being (Rauhala 1983, p. 19-21).

In order to be able to define a holistic notion of the human being, the number of basic modes of being must be supplemented with *the structure of the basic modes of being* (Wilenius 1987, 1989) to form a comprehensive framework. The structure of the basic modes of being refers to the different basic qualities of the human being. Regarding these basic qualities Wilenius (1978, p. 10-14) states that the human being can be seen as a physical system, an organic system, a mental-psychical system and both a social and cultural system creature. *Physical system* denotes that the structure (e.g., bones and muscular system) and movements of humans can be explained, for example, by the laws of mechanics. From this perspective the human being is often conceptualised in terms of ergonomics. A special feature of the human *organic system* is a well-developed central nervous system, which has implications for human behaviour in terms, for instance, of technophobia. Incorporated in this negative affective state is a strong physiological component, which emerges as tension and arousal of the central nervous system. This state may be experienced without the necessity for conscious, rational appraisal, i.e., humans may experience anxiety tacitly. The human being as a *mental-psychical creature* is a being with unconsciousness, consciousness and self-consciousness. A classic way of delineating conscious activities is to distinguish between thought, emotions and will. Correspondingly, a common way of conceptualising humans is to build the usually underlying definition of the human being on the basis of thinking and other conscious activities. Frequently the modern notion of the human being is intellectually biased: humans are conceived of as primarily perceiving and thinking creatures that plan their actions and circumstances.

Further, according to Wilenius (1978, p. 13), the *social and cultural* are also structures of the basic modes of being. Here the human being is seen in a particular relationship to its environment. In other words, social is a quality of an individual but the nature of this characteristic leads humans to create diverse interactive human networks and social structures. A more recent view is expressed by postmodernism, which assumes that humans are not determined by instincts, laws, needs or systems. Instead, human behaviour is open-ended, changing and creative. Both human nature and knowledge are created and established in the very acts of humans living. This also means that human behaviour can only be understood by 'reading' the broader context of life and history within which the behaviour occurs. The definition of the cultural mode of being includes the social mode of being. These two modes are often seen as intertwined in delineations which apprehend the cultural mode as manifest in social life as symbols, heroes, rituals and values (Denzin 1992, Hofstede 1997). A noteworthy implication of the holistic viewpoint for analyses of CRM is that all humans possess features of the physical, organic, mental, social and cultural modes of being.

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THE NUMBER                              THE STRUCTURE
OF THE BASIC                            OF THE BASIC
MODES                                        MODES
OF BEING                                    OF BEING


Monistic ──────────────── Physical ◄──┐

                                    Organic ◄──┤

Dualistic ──────────                 │
                                    Mental ◄──┤

Pluralistic ◄                        │
                                    Social ◄──┤

                                    Cultural ◄──┘
Monopluralistic ──────────
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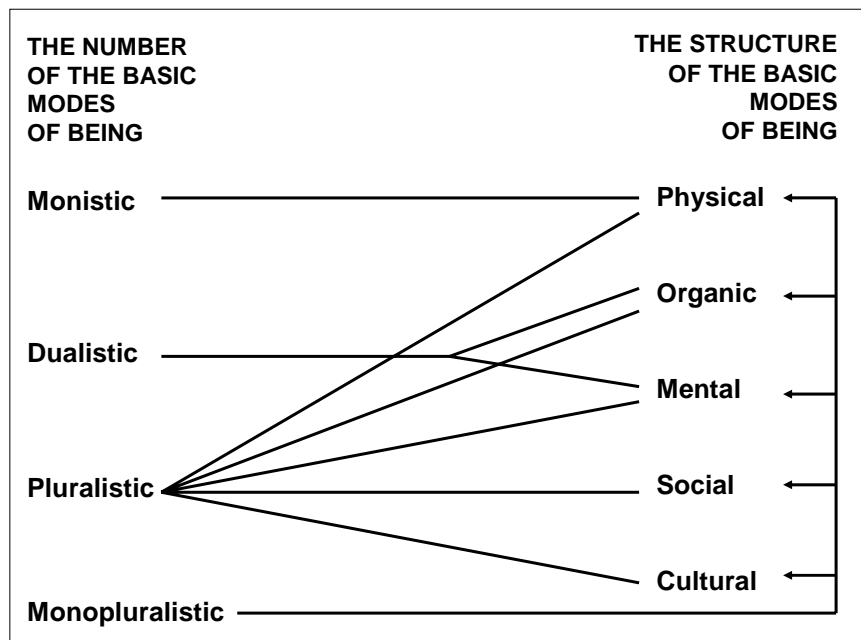
Figure 1. Framework for a holistic view of humans in CRM

These two elements i.e., the number of the basic modes of being and the structure of the basic modes of being together form the basis for our conceptual framework for outlining the multiplicity of the human being as a whole (Isomäki 2002, p. 27-38; 2007). In the framework (Figure 1) *dualistic is connected to organic and mental*, since it is seen to be the most common case according to Rauhala's (1983) analyses. *Pluralistic and monopluralistic* both refer to all five basic modes of being, but *they differ in that pluralistic notions do not perceive connections between the different basic modes of being, whereas the monopluralistic does see them as connected.* In this way it is possible to define a holistic notion.

## HUMAN QUALITIES IN RESEARCH ON CRM IMPLEMENTATION SUCCESS

In this section we apply the human-centred framework for a holistic view of humans in the CRM implementation success literature, and demonstrate the human qualities found in the research papers analysed. The results of our analysis have been summarized in Table 2. In Table 2 we first describe the various human aspects found in a given paper. These aspects have been represented in their original form. In this way we want to illustrate the prevailing image of the human being in the respective paper. Thereafter we have given our own interpretation of these aspects and to which human qualities they refer. Finally, we have assigned the notion of the number of the basic human modes of being and the structure of the basic human modes of being present in the corresponding CRM research paper. The following is a more detailed account of our analysis.

Bose (2002, p. 89) proposes a system development lifecycle that highlights the "aspects unique or critical to CRM" and concludes with some thoughts on long-term CRM implementation success. In Bose (2002) the role of the human being is presented either as a user of a CRM system to assist her in the interaction with the customer, or as a decision-maker, who should make decisions on the basis of the customer information gathered at the interaction points. The

human being is conceptualized as an intermediary between the CRM system and the customer. Humans are conceptualized as "customer contacting channels", where the function of the human being is to record any necessary transactional and non-transactional information on the customer. The only human-related aspect, which Bose (2002, p. 94) explicates, is the notion that "often intelligent IT projects are doomed because of people problems". According to Bose (2002, p. 94) these may include the following aspects: people have cognitive constraints in adopting intelligent systems and people believe they get more support by talking to other people. In Bose (2002) the IS-user relationship is seen as functional: the action of humans is seen as determined by the management decision to implement CRM and management's need to modify firm processes to become more customer-focused. The role of human emotion is to facilitate these processes. A functioning relation between humans and CRM system is thus acknowledged, but does not include any significant features originating from the mental, social or cultural human modes of being. The notion of the "people problems" may appear patronizing. The human being is seen to have some cognitive qualities, but these are represented as preventing and not as promoting successful CRM implementation. The notion that "people believe they get more support by talking to other people" may refer to the need of a human being for peer support and in this respect reflects a social structure of the basic human modes of being. Humans and their behaviour are understood as purely physical/organic responses to the CRM system or only cognitive constraints in adopting systems. We may therefore conclude that in Bose (2002), a monistic/dualistic perspective prevails.

Bull (2003, p. 592) offers an analysis of a single case study of a CRM implementation where the results highlight that "implementing CRM requires effective leadership, sourcing, targeting and evaluation strategies". This study takes the perspective of the management and points out the importance of good leadership in guaranteeing successful CRM implementation. Ultimately Bull (2003) concludes that the implementation of the CRM system in the case company was a failure and describes how bad leadership neglected the full potential of "engaged and empowered sales engineers" (Bull 2003, p. 598). In this respect the study concedes the importance of some human qualities but the level of implementation success is evaluated against the capability of the leaders to train humans to understand "the full implications of CRM in relation to the business requirements" (Bull 2003, p. 597). This indicates that the IS-user relationship is seen as functional and the action of humans is seen as determined by facilitating the business processes. In this study there are some additional human aspects which relate to the selection of the implementation project team members and their attitudes towards the project: "despite initial training, the sales and marketing project team members still lacked knowledge of the full implications of CRM in relation to their business requirements. The project team was selected at random and this caused some discontent. Some of the excluded staff felt undervalued by senior managers. This resulted in fear of CRM that it was about efficiency or cost-cutting exercises, that CRM would replace or de-skill their knowledge and contributions to the organization and result in staff redundancies." (Bull 2003, p. 597-598). These excerpts further highlight the managerial attitude, which regards humans not in terms of their mental qualities like fear or their feelings of being undervalued, not by their qualities in relation to competencies needed in various implementation project tasks, but on the contrary regard humans defined solely by their functional roles. We can conclude that in Bull (2003), although some mental aspects have been pointed out, we cannot see any social or cultural aspects and hence the prevailing structure of the human basic modes of being is physical/organic. Furthermore, the number of the basic human modes of being is monistic/dualistic.

In Campbell (2003) the focus is on the firm's internal processes in creating customer knowledge competence. Campbell (2003, p. 375) suggests that for CRM to be successful, "changes are required in the way firms manage customer information internally" and discusses her research framework of customer knowledge competence in light of five case studies of firms implementing customer relationship programmes. Her research framework consists of four components, all involving humans. The first component a "customer information process refers to the set of

behavioural activities that generate customer knowledge pertaining to customers' current and potential needs for products and services" (Campbell 2003, p. 376). The second component "marketing-IT interface refers to the process by which marketing and information technology functions communicate and cooperate with each other". The third component "senior involvement refers to processes by which top management signals its support for the generation and integration of customer knowledge within the firm". Finally, the fourth component "the employee evaluation and reward system refers to process by which employee behaviour is aligned to the firm's goals of generating and integrating customer knowledge into the firm's marketing strategies". Campbell (2003) includes the last two components "because of their role in shaping the manner in which employees interact with each other to share customer information" (Campbell 2003, p. 377). The notions of employee interaction and sharing of customer information point to a social structure of the basic human modes of being. As a result of using her framework in analysing the five cases Campbell (2003, p. 381) concludes that "the marketing-IT interface is more effective when functional areas are integrated by joint committees or project teams". This further highlights a perspective on a social structure of the human modes of being. However, Campbell (2003, p. 382) reports that her research results indicated that "employee reward systems were revenue-based rather than behaviour-based". She does regard humans more as acting in the functional role of acquiring customer information than as mental creatures possessing cognitive qualities, which might assist in understanding and gathering information on what the needs and wants of a specific customer are. In Campbell (2003) the prevailing structure of the basic modes of being is organic/mental and the human being is conceptualized from a monistic/dualistic perspective.

Chen and Popovich (2003) explore the critical components that can enable (or hinder) the successful implementation of CRM initiatives and introduce a CRM implementation model that integrates the dimensions of humans, process and technology. In their account of humans as success factors, Chen and Popovich (2003) take the user as potentially opposed to any change. They stress the managerial view of a need for top management support and commitment to change "the way people do their work today". Chen and Popovich (2003, p. 685) suggest that "management must ensure that job evaluations, compensation programmes, and reward systems are modified on a basis that facilitate and reward customer orientation. After all, how people are measured will determine their behaviour". This notion illustrates a "stick-and-carrot" principle, which is seen as the driver for changing humans. The human being is seen only as a one-dimensional creature, as an instrument to be utilized by management in order to fulfil CRM goals. However, the human being is known to need adequate skills to use a CRM system, be motivated to adjust to the obvious organizational changes as the organization needs to become more customer-oriented, and is seen as adjusting her behaviour if compensation is increased in order to diminish her resistance to organizational changes. Still, there is in Chen and Popovich (2003) no evidence of taking the human being as a mental creature possessing various cognitive qualities, which would enhance the acquisition of information of customer relationships. The human being in this study is basically described from a monistic viewpoint and no social/cultural structures but rather physical/organic structures of the basic human modes of being are present.

Colgate and Danaher (2000) examine the effects which the implementation of a relationship strategy may have on overall customer satisfaction and loyalty. Specifically, they examine the implementation of a personal banker strategy as a means to developing customer relationships in the retail banking industry. Their results show that both positive and negative effects are possible and that the effects appear asymmetric. A strategy implementation rated excellent will raise overall customer satisfaction and loyalty more than if no such relationship strategy exists. Conversely, a strategy implementation rated poor results in lower overall satisfaction and loyalty among customers engaged in such a strategy compared with those who are not. In this study the human being has been cast in the role of a personal banker and seen as an instrument facilitating the relationship strategy of the bank. Colgate and Danaher (2000, p. 385)

reveal some human qualities that would in this context account for an excellent versus a poor performance by a personal banker by noting that "most important attributes for successful personal banker are being available for the customer, friendliness, fulfilling promises made to customers, and being flexible in meeting customer needs". However, the main success measure used to judge the personal banker's performance is how he/she has performed from the customer's point of view. Even though mental qualities like the feeling of achievement and trustworthiness have been explicated, the prevailing mode of the human being is physical/organic in that she has been instrumentalized in the role of a personal banker. However, as some mental qualities have been represented, too we argue that as a whole the human being in this research has been described from a pluralistic viewpoint and that a social (facing a customer over a bank counter) structure of the basic modes of being is present.

The objective in the case study by Corner and Hinton (2002, p. 239) is "to identify those variables that present risks to effective and successful implementation in the light of the operating relationships between the main actors in multi-channel CRM implementation projects". In light of the earlier literature on risks to IT implementation Corner and Hinton (2002) discuss eight sets of risk categories out of which two – system users as a risk category and politics and vested interests as a risk category – deal with human-centred aspects. The results of their case study (Corner and Hinton 2002, pp. 242, 244) did not support the proposition, that system users are a risk category in the sense "that users would be reluctant to support the project; that user interfaces would not have been designed to fit well with their working style; that implementation time would have been disproportionately long; or that no viable data would have been present in the system at its outset". However, the nature of the users (sales staff operating away from the office for most of the time) did present the problem "that the remoteness from each other meant that they had difficulty in sharing their relative success or problems with each other and the support staff whose job it was to help them". In Corner and Hinton (2002) the users are described as acting in a social context, where they feel the need to share their success in using the CRM and feel the need to give and get help from others. Furthermore, the users are described as having been instrumental in defining their own processes so as to keep these in line with the organizational culture. As another human-centred aspect Corner and Hinton (2002, p. 245) evince an example of how "political infighting may result in the failure to obtain committed support for a CRM implementation, and how a vulnerable system sponsor may risk the CRM implementation". In the case company a sales director declined to accept ownership of the implementation because of an ongoing conflict with another sales director from a different sales area. Politics and vested interests may be interpreted as evidence of humans resisting any change, wanting to maintain the status quo, and of a conservative attitude towards anything new. The human being is described as showing further mental qualities like selfishness and unwillingness to cooperate with colleagues whom he/she dislikes. In Corner and Hinton (2002) the human being is described from a pluralistic viewpoint. The humans responsible for the execution of the CRM implementation project hold positions within a sales organization and they are described in a social context of a sales team or group of colleagues sharing emotions of success. We can conclude that the structure of the basic modes of being is a social/cultural one.

Based on social exchange theory and applying a quasi-experimental design, Gefen and Ridings (2002, p. 49) study "whether responsiveness to user requests in real-world settings is a plausible cause of increased favourable user assessments of the correctness of the configuration and user willingness to adopt a CRM system". In this study the focus is on the user and the study is motivated by bringing to the fore the importance of gaining user approval of a CRM system, "because the users of the CRM are typically the organization's personnel who have contact with a large proportion of its clients and the revenue these clients bring, user approval of the way in which the CRM was correctly configured testifies to the ability of the CRM to increase these revenues through its support of client-oriented business processes" (Gefen and Ridings 2002, p. 49). In this study the researchers suggest that viewing the interaction between the users and the implementation

team as a social exchange, at sites where the implementation team is highly responsive, users will be more inclined to believe in the cooperative intensions of the team and accordingly to assess the CRM more favourably and to be more inclined to approve it. The data in the study support this suggestion and show that perceived responsiveness is associated with a more favourable assessment of the CRM system. However, the study implies that what users *perceive* as responsiveness, rather than *actual* responsiveness, is what directly has these effects. The perspective on users is a managerial one but the humans are not separated from the development of the CRM system and from viable interactions with IS designers. On the contrary in this study the interest is in what humans feel about the "configuration" of the CRM system and the users are studied in two different settings, which differ in respect to the designers' responsiveness to users. The focus is on the users' perceptual assessments of a CRM system, but the researchers do not explicitly study specific human qualities which might support the CRM approval. The users are conceptualized in a social team setting and the communication between humans as members of both sales and implementation teams is the main object of the study. We may conclude that in this research the prevailing mode of being is pluralistic/monopluralistic and the structure of the modes of being is a social/cultural one.

In order to help companies achieve greater success with CRM strategy development and implementation, Payne and Frow (2005, p. 168) introduce a conceptual framework for CRM. In the framework they identify five key cross-functional processes: a strategy development process, a value creation process, a multichannel integration process, an information management process and a performance assessment process. The only process in this framework to consider the role of humans is the multichannel integration process. In this process Payne and Frow (2005, p. 172) represent various customer interaction channels and categorize these channel options into six categories. Out of these categories the channel options "sales force", "outlets", and "telephony" are based on "physical contact" with a human being. However, the framework does not in any detail include descriptions of the roles or tasks of the human beings in this context. Nor do the authors assess qualities of the human beings, which would support successful implementation of the multichannel integration process. The failure to explore "people issues" is, however, explicated by the authors, too (Payne and Frow 2005, p. 167&174): "we emphasize the importance of CRM implementation and related people issues as an area in which further research is urgently needed". To conclude, we may note that in Payne and Frow (2005) the human being is conceptualized solely as a physical entity and hence the study illustrates a monistic mode of being.

Given its number of citations, the article by Peppard (2000) may be seen as a seminal work about applying CRM in the financial services industry. Peppard (2000) presents a CRM framework based on incorporating e-business activities, channel management, relationship management and back-office/front-office integration within a customer centred strategy. Peppard (2002, p.324) further illustrates the interdependent nature of the entities in his CRM framework. By introducing the CRM framework, he motivates the reader before embarking on any initiatives "to broaden the scope from just focusing on relationship management". However, the only entity in the framework, in which the human being has a role, is channel management. Peppard (2000, p. 319) points out that it is the customer's own choice which contacting channel she chooses and prefers and that "delivery channels must be viewed in terms of appropriateness to the task that the customer wants to perform". Although banks have utilized e-channels extensively, Peppard (2000, p. 320) note that "customers seeking to purchase high-value, complex financial products are likely to continue to value face-to-face interaction of the branch environment". The human being in Peppard (2002) is also conceptualized as a physical entity and hence the study illustrates a monistic mode of being.

Plakoyiannaki and Tzokas (2002) maintain that in order to avoid potential failures in CRM implementations, firms should identify and develop capabilities enabling the successful implementation of their CRM systems. The authors define capabilities "as the capacity to deploy resources by integrating knowledge, business processes and organizational learning" (Plakoyiannaki

and Tzokas 2002, p. 229). Plakoyiannaki and Tzokas (2002) then introduce five core capabilities to ensure successful CRM implementations: learning and market orientation capabilities, integration capabilities, analytical capabilities, operational capabilities, and direction capabilities. By analysing their capability framework, it is very hard to identify the human being in any of the explicated capabilities. Embedded in the representation of operational capabilities is the notion of "utilized and enhanced (human) resources" and "(human) skills developed at functional and administrative levels" (Plakoyiannaki and Tzokas 2002, P. 234). Moreover, the authors note that included in the "learning and market orientation capabilities" is the capability to "generate customer insight through learning and this requires information inputs, which are converted by the players involved to information outputs for sense or decision-making purposes" (Plakoyiannaki and Tzokas 2002, p. 233). To conclude, the human being is portrayed as a physical entity on an abstract level as a "player", who should be capable of gathering customer information and "converting" it into "information outputs" for decision-makers. This study, too exemplifies a monistic mode of being.

In their study Reinartz et al. (2004) conceptualize a construct of the CRM processes and its dimensions, operationalize and validate the construct, and empirically investigate the organizational performance consequences of implementing CRM processes. The focus in this study is on the customer-facing level of CRM processes, which then include the building of a single view of the customer across all contact channels and the distribution of customer intelligence to all customer-facing functions. The three primary CRM processes, which Reinartz et al. (2004) found to be significant in their construct are relationship initiation, maintenance, and termination. Furthermore, the authors investigated the significance of two moderating variables, namely organizational alignment and technology. Reinartz et al. (2004, p. 301) report as the main result of the study that "the implementation of CRM processes is associated with better company performance in two of the three stages" and that "the strongest effect is for relationship maintenance, followed by relationship initiation". The notion of the human being in this study is embedded in the moderator construct of "organizational alignment". In this construct the authors included training, rewarding of humans for building and intensifying relationships with customers, and "organizing people to deliver differentiated treatment and products to different customer segments" (Reinartz et al. 204, p. 304). The results of this study indicate that "there was a significant interaction between a CRM-compatible organizational alignment and both relationship termination and initiation" (Reinartz et al. 204, p. 302). The conception of the human being does not incorporate any human characteristics but on the contrary refers to humans as "objects of organizing", as physical objects. Hence, this study exemplifies a monistic mode of the human being. Furthermore, humans are seen to accomplish their tasks and activities in the CRM processes driven solely by incentives. The study does not acknowledge a human being as a cognitive creature, who would in her work feel the affordance of the CRM system.

Ryals and Knox (2001, pp. 534-535) in their study set out to address issues concerning marketing implementation through the application of CRM and related technologies and explore three issues that may enable (or hinder) the development of CRM in the service sector: the organizational issues of culture and communication, management metrics, and cross-functional integration between marketing and information technology. Related to the organizational and cultural issues in Ryals and Knox (2001) the human being is seen as a physical object of change. This is evident in the notion that "as companies attempt to re-orientate themselves around customers, individual employees will have to come to terms with changing cultural norms and organizational structures" (Ryals and Knox 2001, p. 537). Furthermore, Ryals and Knox (2001, p. 537) maintain that as "the individual employees are the building blocks of customer relationships, the measurement system should facilitate and reward customer orientation". Here the structure of the basic mode of being is social/cultural. This is explicated by a need for an organizational culture which is adaptive and responsive to change, and where the quality of the communication within the organization is seen as an important aspect of the change initiative. However, the communication is

predominantly seen as one-directional: from management to humans in order to "successfully communicate a change initiative" (Ryals and Knox, 2001, p. 537).

Ryals and Payne (2001, pp. 20-21) report on a study of the adoption and use of CRM in the financial services sector and explicate some barriers to successful implementation of CRM. The lack of skills of the user in building and using a CRM system is seen as one barrier, especially the lack of analytical skills during the implementation, "the skill of asking the right questions". The individual is seen as conservative and opportunistic in terms of her wanting to retain her proprietorial ownership of a customer, not wanting to share information about a customer relationship, and not wanting to cooperate with colleagues from different business units. Low awareness of the benefits of a marketing database was seen as an additional barrier: the users did not sense an affordance by the CRM system. The human being is described from a pluralistic viewpoint showing conservative and opportunistic behaviour and acting individualistically and indeed selfishly. The social and cultural structures of the human basic modes of being are also present in this study, which is evident in the notion of the opportunistic behaviour by business unit managers.

Speier and Venkatesh (2002) use identity theory to investigate salesperson perceptions associated with CRM technology rejection. This study investigates the individual characteristics which might influence a human's perception and use of technology on the basis of individual traits and dispositions toward the technology. Speier and Venkatesh (2002) include in their research framework items related to the various role perceptions of humans as well as items reflecting humans' perceptions of how technology might influence professional and organizational roles. The authors collected survey data from 454 salespersons across two firms that had implemented sales force automation (SFA) tools. The results indicate that immediately after training, the salespersons had positive perceptions of the technology. However, six months after implementation, the technology had been widely rejected, and salesperson absenteeism and voluntary turnover had increased significantly. Speier and Venkatesh (2002, p. 108) summarize that the results stem from growing lack of professional fit between the SFA tools and the salespersons: humans perceived that the SFA tools had a negative impact on and/or disrupted the sales process to the point that the system did not enhance their strengths as salespersons. Furthermore, humans were unable to accurately forecast their assessment of relative advantage in the context of changes the SFA technology would bring to their job. The items investigated represent plural conceptions of the human being. The study investigates how humans feel about their relationship with the technology; whether the technology is perceived by humans to either support their own competences or deskill them by the potentially embedded expert system features in the SFA. In this study the human's physical, mental and social/cultural modes of being are inextricably linked. Involvement and participation of the users as well as issues of voluntary (versus mandatory) use were investigated, too. Hence, we may conclude that the study by Speier and Venkatesh (2002) represents a monopluralistic conception of the human being.

Wilson et al. (2002) use the analytic induction method in examining factors which influence the successful deployment of CRM applications. Wilson et al. (2002, p. 206) argue that "user involvement in system design needs to be face-to-face, not just at a distance through the writing and review of specification documents". Furthermore, Wilson et al. (2002, p. 206) note that "the nature of the domain (CRM) required creativity in the definition of new processes, which was aided by the interactivity of face-to-face meetings". The authors emphasize the importance of involving users interactively in system design. The notion of the "creativity in the definition of new processes" portrays humans as willing to learn about their own work processes and refers to learning stressing both cognitive and social human features. This conceptualisation of users suggests that the relationship between users and designers as well as the IS-user relation is a reciprocal process, including characteristics typical of human behaviour. As a factor with limited support to the success of a CRM implementation Wilson et al. (2002, p. 208) address the issue of

cultural change, such as staff willingness to share (customer) data: "the project plan needs to address any requirement to change organizational culture, such as addressing staff willingness to share data, rather than leaving this issue until later or ignoring it". This notion and the need for a company to "organize round customer" (Wilson et al. 2002, p. 206) both refer to the need for users to be flexible in changing their perceptions of ownership of organizational resources: customer knowledge. Underlying this notion in Wilson et al. (2002, p. 201) is the prevailing image of the human being "empowered and not controlled by systems". In Wilson et al. (2002) we have identified various human qualities. The human being is seen as an active participator, an "actor" in the design work and not just as an instrument, "a user". We argue that in Wilson et al. (2002) the basic human modes of being: physical, organic, mental, social and cultural are present simultaneously. Therefore, the human being is here described from a monopluralistic viewpoint and the social as well as the cultural structures of the human basic modes of being are present.

Xu et al. (2002, p. 442) represent concepts of CRM "from micro- and macro-perspectives" and give some CRM "implementation tips".  In the "personnel" section of their micro-analysis Xu et al. (2002) point out that in the process of a firm becoming customer-focused a CRM system will change the way information flows within a company. CRM involves more and better communication between a company and its customers, and also within the company itself. This entails a fundamental shift in the information flow within an enterprise, from quantitative data to qualitative data, "it is about integrating strategy, process, technology, and people in a comprehensive change management process" (Xu et al. 2002, p. 446). Xu et al. (2002) see that humans' resistance to this change process is one of the major risks associated with CRM implementation. A training programme is seen as one of the solutions to this and also to let the end-users and "enthusiasts" become involved early in CRM implementation and "spark a grass-roots movement" (Xu et al. 2002, p. 447). In this study humans have been conceptualized as "resisters to change" and "objects of training". The study identifies some mental qualities of humans in admitting that some humans may be "enthusiastic" about CRM. However, the prevailing image of the human being is that of a physical object which resists change and should be dealt with by training. We see in this study the monistic mode of the human being where the structure of the mode of being is physical.

Zablah et al. (2004, p.485) outline a framework that identifies "the key steps towards CRM success" and define CRM success as "a firm's ability to efficiently build and sustain a profit-maximizing portfolio of customer relationships". According to their framework the first step towards CRM success is specifying a relationship marketing strategy. The second step is to define the relevant CRM processes and process roles, as well as an allocation of responsibilities for process activities among humans and groups (Zablah et al. 2004, p. 485). Knowledge management and interaction management are seen as the two main CRM processes. The human being is conceptualized here in terms of her role and activities in a CRM process. The third step in the success framework is to assess the state of a firm's CRM capabilities to ensure that the firm has the requisite resources to effectively execute the activities related to each of the CRM processes. Here humans are seen as one resource in addition to physical and organizational resources. The last steps in the success framework are enhancing existing processes and continuous monitoring, evaluation, and improvement of the processes. We may conclude that in Zablah et al. (2004) humans are conceptualized as physical objects, as roles in a process. There are no indications in their CRM success framework of any social or mental qualities of humans. Therefore, the basic mode of being is monistic and the structure of the basic mode is physical.

| Paper | Human aspects found in the paper reviewed | Interpretation and description of the human qualities in the paper reviewed | Number of the basic modes of being | Structure of the basic modes of being |
|---|---|---|---|---|
| Bose 2002 | Salespersons function as customer interaction points, as intermediaries between the CRM system and the customer.<br><br>Users must be trained in order to understand the business process changes, which may be involved in a CRM implementation. | The main function of the human being is to record in the CRM system any necessary transactional and non-transactional information of the customer.<br><br>Human beings are seen as "problems" for the successful implementation of a CRM system, because they have cognitive constraints in adopting intelligent systems. Human beings need support by peers. | **Monistic/dualistic** | **Mental/social** |
| Bull 2003 | Good leadership is important in guaranteeing successful CRM implementation. | The implementation of the CRM system in the case company was a failure. This is suggested to highlight how bad leadership neglected the full potential of "engaged and empowered sales engineers".<br><br>Leaders should train humans to understand "the full implications of CRM in relation to the business requirements". Some humans felt undervalued by senior managers. This resulted in fear of CRM that it was about efficiency or cost-cutting exercises, that CRM would replace or reduce their knowledge and contributions to the organization and result in staff redundancies. | **Monistic/dualistic** | **Physical/organic** |
| Campbell 2003 | Employees' behaviour should be directed to activities which generate customer knowledge pertaining to customers' current and potential needs for products and services.<br><br>Employees' behaviour should be aligned to the firm's goals of generating and integrating customer knowledge into the firm's marketing strategies. | Humans should interact with each other to share customer information and their behaviour in this direction should be rewarded accordingly. | **Monistic/dualistic** | **Organic/mental** |
| Chen and Popovich 2003 | Top management should support the CRM implementation.<br><br>The project champion should persuade top management for continuous change efforts.<br><br>Management should show commitment to change job evaluations, compensation programmes, and reward systems. | A "stick-and-carrot" principle is seen as the driver for changing humans.<br><br>The human being is seen only as a one-dimensional creature, as an instrument to be utilized by management in order to fulfil CRM goals. | **Monistic** | **Physical/organic** |
| Colgate and Danaher 2000 | The main success measure to judge the implementation of a relationship strategy is the degree to which a personal banker "performs" from the customer's point of view. | The human qualities that would in this context explain an excellent versus a poor personal banker's performance are: being there for the customer, friendliness, fulfilling promises made to customers, and | **Pluralistic** | **Social** |

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|---|---|---|---|---|
| | | being flexible in meeting customer needs.<br><br>The human being is seen as an instrument to enable the relationship strategy of the bank. | | |
| | | | | |
| Corner and Hinton 2002 | All "players" in the implementation should be able to share experience of CRM use with others and have the sense of belonging to a social group.<br><br>Political infighting may result in the failure to obtain committed support for a CRM implementation. | Remoteness from each other meant for sales staff that they had difficulty in sharing their relative success or problems with each other and the support staff whose job it was to help them.<br><br>The human being is described as showing mental qualities like selfishness and unwillingness to cooperate with colleagues that he/she dislikes. | **Pluralistic** | **Social/cultural** |
| | | | | |
| Gefen and Ridings 2002 | CRM implementation team should be responsive to users' assessment of the correctness of the configuration of a CRM system. | Users will assess the CRM more favourably and will be more inclined to approve of it if they perceive responsiveness from the implementation team. | **Pluralistic/monopluralistic** | **Social/cultural** |
| | | | | |
| Payne and Frow 2005 | "Sales force" is categorized as a physical (as opposed to virtual, like Internet-based) channel option for customer contacting. | The human being is conceptualized as a physical object, as a customer contacting channel. | **Monistic** | **Physical** |
| | | | | |
| Peppard 2000 | "Face-to-face" interaction is valued by customers. | The human being is conceptualized as a physical object, as a contacting channel option for the customer. | **Monistic** | **Physical** |
| | | | | |
| Plakoyiannaki and Tzokas 2002 | "Players" should "convert" "information inputs" to "information outputs for sense and decision-making purposes". | The human being is portrayed as a physical entity on an abstract level, as a "player", who should be capable of gathering customer information and "convert" it to "information outputs" for decision-makers. | **Monistic** | **Physical** |
| | | | | |
| Reinartz et al. 2004 | Companies should stress to employees that CRM activities are important, structure their organizations to facilitate these activities, and reward employees for engaging in CRM-related activities. | The human being is seen as an object for organizational alignment, which can be achieved by training, rewarding of humans for building and deepening relationships with customers, and organizing humans to deliver differentiated treatment and products to different customer segments. | **Monistic** | **Physical** |
| | | | | |
| Ryals and Knox 2001 | As companies attempt to re-orientate themselves around customers, individual employees will have to come to terms with changing cultural norms and the way their performance is measured and rewarded. | The human being is conceptualized as an object of change and the failure to successfully communicate a change initiative and its implications for humans is seen to lead to failure of CRM implementation. | **Monistic** | **Social/cultural** |
| | | | | |
| Ryals and Payne 2001 | People lack skills in building and using the CRM system.<br><br>People have low awareness of the benefits of a marketing database.<br><br>Business unit managers are unwilling to cooperate with others.<br><br>People are opportunistic. | Humans lack analytical skills in order to "ask the right questions" during the implementation phase of a CRM system.<br><br>Humans want to retain their proprietorial ownership of a customer and fear of losing their power if they share their information on customers with others. | **Pluralistic** | **Social/cultural** |

| | | | | |
|---|---|---|---|---|
| Speier and Venkatesh 2002 | Salespersons may reject technology due to the lack of professional fit between the SFA tools and the salespersons. | Humans perceive that the SFA tools may have a negative impact on and/or disrupt the sales process to the point that the system does not enhance their strengths as sales persons.<br><br>Humans may be unable to accurately forecast their assessment of relative advantage in the context of changes the SFA technology would bring to their job in the long run. | **Monopluralistic** | **Social/cultural** |
| Wilson et al. 2002 | User involvement in system design needs to be face-to-face.<br><br>The nature of the domain (CRM) requires creativity in the definition of new processes, which should be aided by the interactivity of face-to-face meetings with users.<br><br>Organizational culture should address staff willingness to share data. | The first aspect emphasizes the importance of involving users interactively in system design and acknowledges their intellect and capability to address conceptions of design issues suitable to themselves.<br><br>The second aspect highlights humans as willing to learn about their own work processes and refers to learning which stresses both cognitive and social human features.<br><br>The third aspect suggests that users need to be flexible in changing their perceptions of ownership of organizational resources: customer knowledge, but it implies that users are free-willed and that they inherently understand the need for sharing data with colleagues. | **Monopluralistic** | **Social/cultural** |
| Xu et al. 2002 | Employees' resistance to (change) is one of the major risks associated with CRM implementation. | The human being is conceptualized as an object of change. | **Monistic** | **Physical** |
| Zablah et al. 2004 | "Organizational members" have "tremendous" impact on the knowledge management process.<br><br>Employees' ability to leverage their understanding of individual customers and human behaviour often has a substantial impact on the outcome of exchange episodes. | The human being is conceptualized in terms of her role and activities in the two main CRM processes, which are knowledge management and interaction management processes. | **Monistic** | **Physical** |

**Table 2. Summary of the human qualities found in the CRM implementation success literature reviewed**

## DISCUSSION

Where the nature of the human being is delineated in the context of CRM, the human being is seen as an actor. This is inherent in the term 'user', referring to a human being who uses computers. Thus, the basic human modes of being are understood as active elements through which the human being is relates to IS. According to this active view, the different basic modes of being each to some extent contribute to a continuum of an active process within which the human being as a whole is active with the system (Isomäki 2002, p. 38-43). This underlines three notable characteristics in

human action. First, the hierarchical nature of the basic human modes of being is also active in nature: within human action the different modes interact with each other. Second, in human action there are both conscious or explicit and unconscious or tacit dimensions, both of which contribute to human experience. Third, the tacit and explicit dimensions are inextricably linked in the basic human modes of being. This is because humans are not conscious of all the aspects in their own experiences within their life situations. Therefore, it seems that in order to understand the active human being as a whole, we need to pay attention to both the interacting basic human modes of being and their tacit as well as explicit features in human behaviour (Isomäki 2007). This requires a holistic perspective on the human being as a user of CRM applications.

Cook and Brown (1999) offer conceptual means for transcending the subject-object dualism in regard to the IS-user relationship by defining a part of human action as involving static human features and another part as consisting of affordances emerging dynamically in an interaction. Dynamic affordance refers to the sense of affordance reflected within the relationships between characteristics of the world and issues of inherent concern to humans, such as the basic human modes of being. Usually they provide humans with the ability and need to be physical, organic, mental, social, and cultural creatures with their own will. However, the actual behavioural implications of the basic human modes of being emerge within the interaction between humans and ITs. In brief, dynamic affordance puts emphasis on the experience emerging from the basic human modes of being within the interaction of humans with the world. The structure of the basic human modes of being indicates the richness of that interplay and the emergent experience. Because this emerging experience is an implication of the (static) basic human modes of being, it is important to consider them as constituting elements of users' experiences in using CRM applications. Consequently, understanding human action requires insight into the different basic human modes of being and their implications within the dynamic affordances occurring between humans and IS as well as between customers and salespersons during the process of CRM.

While several studies have pointed out that we should know more about how human issues may be connected to the success of CRM implementations (Boulding et al. 2005; Payne and Frow 2005; Mendoza et al. 2007), there have been only few research projects, where in studying CRM implementation success the main focus has been on the human being (Gefen and Ridings 2002; Speier and Venkatesh 2002; Wilson et al. 2002). On the contrary, earlier research into the image of the human being in CRM has been functional or quantitative in nature and concentrated mainly on job functions and work activities (Moncrief et al. 2006). The functional image of the human being concentrates on formal job descriptions, external work tasks and humans' task productivity. Our study is the first conceptual investigation into how the qualities of the human being emerge in the existing CRM implementation success literature and provides both academics and managers with a conceptual framework for achieving a holistic view of humans in CRM implementation. Our framework identifies key elements within the holistic perspective. In this way we extend the frameworks for CRM by other researchers (Mendoza et al. 2007; Payne and Frow 2005). By applying the holistic framework we have outlined the nature of the human being in the context of CRM implementation success and demonstrated what kind of quality assumptions may be connected to humans in this context.

In eleven out of the seventeen articles which we analysed the basic human mode of being is either monistic or monistic/dualistic. This indicates that the prevailing image of the human being in the CRM implementation success literature is that of a physical object. The human being has been portrayed as an "intermediary" between the CRM system and the customer (Bose 2002), as a "player" in the firm's portfolio of CRM capabilities (Plakoyiannaki and Tzokas 2002), or as an "organizational member", with certain roles, who should execute certain activities pertaining to that role (Zablah et al. 2004). Furthermore, our results demonstrate that the prevailing image of humans as CRM system users is a managerial one. The managerial perspective regards humans not in terms of their mental qualities, like fear, or their feelings of being undervalued, not by their qualities in

relation to competencies needed in various CRM implementation tasks, but on the contrary solely by their functional roles (Peppard 2000; Reinartz et al. 2004; Payne and Frow 2005). In only three of the articles is the human mode of being pluralistic in that the human being has been shown to possess mental qualities like feelings of friendliness, jealousy, selfishness, opportunism, or the need for responsiveness (Colgate and Danaher 2000; Corner and Hinton 2002; Ryals and Payne 2001). At the same time humans are seen as social creatures, when e.g., salespersons' feelings of remoteness from IT support colleagues had a negative effect on salespersons' ability to share their feelings of success with support persons about using CRM (Corner and Hinton 2002).

According to the results of our analysis a monopluralistic conception of the human being is represented in only three of the eleven articles. In the monopluralistic articles users' own assessment of the correctness of the configuration of a CRM system is seen as a major factor for successful CRM implementation (Gefen and Ridings 2002), humans are admitted to have difficulty in assessing the relative advantage the use of CRM would bring to their job (Speier and Venkatesh 2002), or humans are involved interactively in the CRM system design, where their intellect and capability to address conceptions of design issues are acknowledged (Wilson et al. 2002). In these articles the holistic quality is revealed in several ways: first, a number of human characteristics is recognized; second, the human features are often seen to co-exist or intertwine with each other; third, these conceptualisations suggest that the relationship between users and CRM system designers as well as the IS-user relation is a reciprocal process, including characteristics of typical human behaviour.

Our study offers managers insight into how the various human qualities may be taken into account when in various CRM processes they assign the appropriate customer interaction and knowledge management responsibilities to humans. To succeed in CRM implementations managers should apply a holistic perspective on the human being as a user of CRM applications. We suggest that it would be hazardous for managers to understand humans solely in terms of distribution of tasks, in accordance with the roles and instrumental purposes. It is important to focus more on the individual and personal human qualities and make efforts to show humans the affordance of the CRM system in their daily practices.

We do concede that our research has limitations by concentrating on only one role within CRM, namely that of a salesperson. Future research should also take into account the managerial and executive roles as well as various other roles in customer service and part-time marketing functions. Furthermore, our literature review was limited to a selected number of articles, which, however, were the most cited in the scholarly literature. We suggest that in the future our holistic framework should be applied to the research of the human beings in CRM in addition to the functional approaches. We interpreted the text of the articles selected and first identified aspects related to humans in general and thereafter, identified potential qualities of the human being as they emerged from the text. In so doing we met some challenges in the interpretation work as in some of the articles the author/researcher introduced his or her own theory or framework. We did not evaluate the human-centredness in the article based on the quality of human-centredness of that particular theory or framework but rather on how the human qualities emerged from the text itself. Clearly a paradigm shift from quantitative to qualitative approaches is needed. Specifically, we suggest that researchers should make extensive use of qualitative methods, such as phenomenography (Marton and Booth 1997). In this way we could gain more insight into those tacit and sensitive dimensions of human beings which cannot be revealed by quantitative methods, because these are too reductive in nature.

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