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Performance Measures for Social CRM: A Literature Review

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Abstract

Social CRM deals with the integration of Web 2.0 and Social Media into Customer Relationship Management (CRM). Social CRM is a business strategy supported by technology platforms to provide mutually beneficial value for companies and their target groups. In practice, one factor impeding Social CRM implementation is the lack of performance measures, which assess Social CRM activities and monitor their success. Little research has been conducted investigating performance measures in order to develop a Social CRM performance measurement model. To address this gap, this article presents the qualitative part of a two-stage multi-method approach. It comprises a systematic and rigorous literature review as well as a sorting procedure. In this effort, 16 Social CRM performance measures and four categories of a performance measurement system are identified. The sorting procedure validates the corresponding classification and ensures a high degree of external validity. In a subsequent study, formative survey instruments are developed from the respective findings and are tested by applying a confirmatory factor analysis.

Keywords: Social CRM, Social Media, performance measures, Social CRM performance

1 Introduction

Social Customer Relationship Management (Social CRM) deals with the integration of Web 2.0 and Social Media into CRM (Lehmkuhl and Jung 2013). According to Askool & Nakata (2011) Social CRM is a new paradigm and defined by Greenberg (2010) as "[...] a philosophy and a business strategy, supported by a technology platform, business rules, processes and social characteristics, designed to engage the customer in a collaborative conversation in order to provide mutually beneficial value in a trusted and transparent business environment". Additionally, Social CRM describes the creation of "[...] a two-way interaction between the customer and the firm. It is a CRM strategy that uses Web 2.0 services to encourage active customer engagement and involvement" (Faase, Helms, and Spruit 2011).

The implementation of Social CRM "requires transformational efforts among all organizational parts" (Lehmkuhl & Jung, 2013) and has the potential to provide mutually beneficial value for the company and their customers. A prerequisite to start the transformational process is the identification of Social CRM objectives and corresponding performance criteria, i.e. performance measures (Neely, Gregory, and Platts 1995; Payne and Frow 2005). A performance measure is a metric, which "can be expressed either in terms of the actual efficiency and/or effectiveness of an action, or in terms of the end result of that action" (Neely, Gregory, and Platts 1995)¹. By aligning on Neely's et al. (1995) proposed procedure to develop a performance measurement system design the article follows the two steps being (1) the identification of performance measures, and (2) the classification within a performance measurement system.

The development of Social CRM performance measures is a practical and an academic challenge and the focus of the article. From a practical perspective, identifying and establishing Social CRM performance measures (e.g., metrics, key performance indicators, etc.) are essential for companies to conduct a comprehensive Social CRM strategy (Baird and Parasnis 2011). A corresponding measurement model enables the assessment of Social CRM activities and the monitoring of their success (Sarner and Sussin 2012; Sarner et al. 2011). From an academic perspective, there is a lack of clearly defined performance measures and measurement models based on an empirical foundation (Küpper 2014). Given the lack of empirical research in this regard, there is a literature review performed in order to identify conceptual Social CRM performance measures (aforementioned defined as a metric) as well as to classify them into a Social CRM performance measurement system. Therefore, the corresponding research questions are as follows:

RQ1: What are performance measures for Social CRM?

RQ2: What are corresponding categories that classify the identified Social CRM performance measures?

¹The development of key performance indicators, as the operationalization of a metric, are not the focus in the article, whereas it is a part of further research activities and considered in the research agenda.

To answer the research questions, the article is structured as follows: Firstly, the literature review, according to vom Brocke’s framework, is described (vom Brocke et al. 2009). Secondly, the literature analysis and synthesis is given containing the identification of the Social CRM performance measures and their classification within a performance measurement system. Subsequently, a research agenda is derived with regard to the overall research project. Finally, a short conclusion and limitations are presented.

2 Literature Review

A literature review provides a solid theoretical and conceptual foundation (Levy and Ellis 2006). Figure 1 depicts a framework for reviewing scholarly literature, according to vom Brocke et al. (2009). It comprises five steps being definition of review scope (section 2.1), conceptualization of topic (section 2.2), literature search, literature analysis and synthesis (section 3), and the derivation of a research agenda (section 4). The authors describe the research method in the following subsections according to the argumentation of (Küpper 2014).

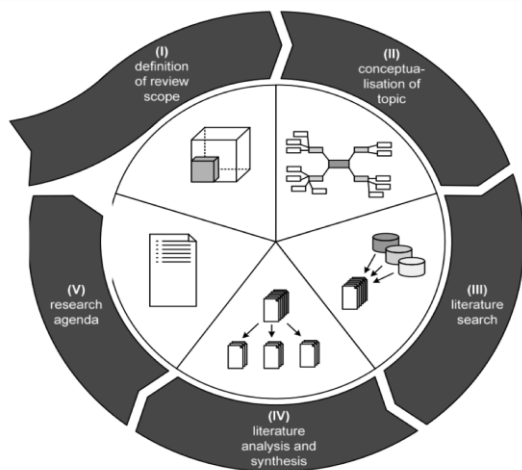


Figure 1: Literature Review Framework (vom Brocke et al., 2009)

2.1 Definition of the Review Scope

Categories	Characteristics			
Focus	research outcomes	research methods	theories	applications
Goal	integration	criticism	central issues	
Organization	historical	conceptual		methodological
Perspective	neutral representation		espousal position	
Audience	specialized scholars	general scholars	practitioners	general public
Coverage	exhaustive	exhaustive and selective	representative	central / pivotal

Table 1: Taxonomy of literature reviews based on Cooper (1988)

The scope of a literature review can be characterized using the taxonomy of Cooper (1988), which differentiates six categories each having a different number of characteristics. The grey shades in Table 1 indicate the literature review characteristics. The *focus* is on the identification of the research outcomes (e.g., different performance measures like “social network monitoring”). Considering the research question, the *goal* is to identify central issues. The *organization* of this literature review is related to a

conceptual foundation. The *perspective* has a neutral representation. The specific research topic constitutes specialized scholars as the target *audience*. Due to the restrict number of articles in the research field the coverage of the literature search is *exhaustive and selective*.

2.2 Conceptualization of the Topic

A literature review has to “provide a working definition of key variable” (Webster and Watson 2002). Table 2 presents an overview of the key variables and their definitions, which are conducted in the literature search.

Key Variables	Definition	Author(s)
Web 2.0	“Web 2.0 is a set of economic, social, and technology trends that collectively form the basis for the next generation of the Internet - a more mature, distinctive medium characterized by user participation, openness, and network effects.”	Musser and O'Reilly 2006
Social Media	“(…) a group of Internet-based applications that build on the ideological and technological foundations of Web 2.0, and that allow the creation and exchange of user generated content.”	Kaplan & Haenlein (2010)
CRM	“CRM is a strategic approach that is concerned with creating improved shareholder value [...] with customers and customer segments. CRM unites the potential of relationship marketing strategies and IT to create profitable, long-term relationships with customers and other stakeholders.”	Payne & Frow (2005)
Social CRM	“(…) a philosophy and a business strategy, supported by a technology platform , business rules, processes and social characteristics, designed to engage the customer in a collaborative conversation in order to provide mutually beneficial value in a trusted and transparent business environment.”	Greenberg (2010)
Performance Measure	A performance measure is defined as a metric, which “can be expressed either in terms of the actual efficiency and/or effectiveness of an action, or in terms of the end result of that action.”	Neely et al. (1995)
Effectiveness	“Effectiveness refers to the extent to which customer requirements are met (…) .”	Neely et al. (1995)
Efficiency	“(…) efficiency is a measure of how economically the firm's resources are utilized when providing a given level of customer satisfaction.”	Neely et al. (1995)

Table 2: Overview of the definitions for Social CRM performance measures

2.3 Literature Search

A rigorous literature search follows the sub-process proposed by vom Brocke et al. (2009) including (1) a journal search, followed by (2) a database search, and (3) a keyword search, and finally (4) a forward and backward search.

The relevant journals for the (1) journal search are derived from the multidisciplinary research areas, namely Information Systems (IS) and Marketing (Lehmkuhl and Jung 2013). A selection of the top-tier IS journals are: Information Systems Research, MISQ and Journal of Information Technology. High ranked Marketing journals are, among others, Journal of Marketing, Journal of Marketing Research, Journal of the Academy of Marketing Science, as well as the Journal of Interactive Marketing. The selection of renowned, double blinded IS conference proceedings include the International Conference on Information Systems (ICIS) and the European Conference on Information Systems (ECIS). The selected high ranked Marketing conferences are the

American Marketing Association (AMA) and the European Marketing Academy (EMAC).

The (2) database search assures the investigation of the previously identified journals. Consequently, the following scholarly databases cover the aforementioned disciplines and are primarily queried and investigated: EBSCOhost, ProQuest, ScienceDirect, Emerald, Web of Knowledge and AISeL.

The (3) keyword search, is the core of the literature search. The keywords and related abbreviations are derived from the key variables in Table 2. The combination of keywords, abbreviations and similarities are hereafter defined as search phrases, which are queried in the databases at hand². The results of the keyword search are given in Table 3. The number in brackets (hits) represents the number of articles found in the respective database using the specific search phrase. Applying a backward reference search later on mitigates the inherent risk of omitting articles. The articles have been further evaluated by manually analyzing (reading) title, abstract and introduction and eliminating duplets. The numbers marked bold represent the net hits after the analysis. The total net hits for the keyword search yields to 18 articles.

The last sub-process step (4) aligns according to Levy & Ellis (2006) backward references search and forward references search. A first-level backward references search focuses solely on the references of the net hit's articles from the keyword search (Levy and Ellis 2006). In sum, this search yields 9 additional articles. The forward references search focuses on articles that contain a reference to one of the net hits articles. Therefore, each of the 18 net hits was analyzed using Google Scholar and the six databases (X. Chen 2010). The forward references search yields 10 additional net hits (see Table 3). This leads to a total of 37 relevant articles that are used for further literature analysis and synthesis.

Database	Keyword Search			Net Hits	Forward Search		Backward Search
	Search Phrases				Hits	Net Hits	Net Hits
	(a)	(b)	(c)				
EBSCOhost	2 (11)	0 (22)	6 (194)	8	196	1	-
Emerald	0 (0)	0 (0)	0 (7)	0	0	0	
ProQuest	2 (43)	2 (67)	3 (250)	7	87	0	
Science Direct	1 (3)	0 (0)	2 (26)	3	0	0	
Web of Knowledge	0 (0)	0 (0)	0 (25)	0	97	2	
Google Scholar	-			-	592	7	
Sum	-			18	-	10	9
Total Net Hits				37			

Table 3: Results of the literature search

² The search phrases are: (a) ("social crm" OR "social customer relationship management") AND ("success" OR "performance" OR "effectiveness" OR „efficiency“); (b) ("crm" OR "customer relationship management") AND ("web 2.0" OR "social media") AND ("success" OR "performance" OR "effectiveness" OR „efficiency“); (c) ("crm" OR "customer relationship management") AND ("success" OR "performance" OR "effectiveness" OR "net benefits" OR „efficiency“).

3 Literature Analysis and Synthesis

The core of a literature review is to analyze and synthesize the relevant articles in order to identify elements for the research topic under investigation (Webster and Watson 2002).

3.1 Findings on Social CRM Performance Measures

Social CRM performance measures		Description
Performance measures with CRM background	Customer Insights	Companies analyze data obtained from Social Media to detect patterns in customer behaviors, and match the results with the existing customer data (master data) in order to obtain a 360-degree view of the customer.
	Customer Orientation	As part of the Social CRM strategy, a company can align organizational processes along customers' needs and devise every touch-point more customer-oriented.
	Market and Customer Segmentation	Social CRM enables a more efficient and effective segmentation.
	Customer Interaction	Through Social CRM, companies interact more effectively with customers (i.e. more intensive and customer-oriented).
	Customer-Based Relationship Performance	Customers perceive an enhanced relationship quality in the context of Social CRM implying that the confidence increases and overall satisfaction rate rises.
	Customer Loyalty	Web-users developed an emotional attachment to the company and are interested in a long-term relationship. It increases the customer willingness to attach with products or services of the company.
	New Product Performance	Social CRM increases the success of newly introduced or developed products and services.
	Organizational Process Optimization	Social CRM enables the enhancement of efficiency and effectiveness through the entire value chain of the company.
	Brand Awareness	Social CRM increases the brand awareness and brand recognition, e.g., by means of customers recommendations.
	Customer Lifetime Value	Social CRM has a positive effect on the profitability of a customer's value over his relationship lifetime. From the company's perspective, the net present value increases with respect to customer's maintenance.
	Financial Benefits	Social CRM increases the potential of cost reduction, particularly, in the area of CRM, as well as the potential of increasing sales.
	Competitive Advantage	By implementing Social CRM, the company encompasses itself from competitors and gained a sustainable competitive advantage.
Exclusive Social CRM	Social Media Monitoring	Capturing information from Social Media about characteristics, needs, behavior and relationships enables further analytical approaches.
	Customer Co-Creation	Social CRM activities support the involvement of customers as co-creators, e.g., in the innovation process.
	Peer-to-Peer-Communication	Customers get the opportunity to interact and collaborate with each other on social media.
	Online Brand Communities	Companies provide a brand community to interact with customers e.g., about service or product related content.

Table 4: Definitions of Social CRM performance measures

The content analysis of the 37 articles is structured in two phases. Firstly, single performance measures are selected from each article leading to a total number of 16 measures. Secondly, each article is re-examined in order to falsify and validate the

results. Concerning the first research question (*RQ1: What are performance measures for Social CRM?*), table 4 presents the findings and corresponding definitions³.

Four out of 16 performance measures (“Social Network Monitoring”, “Customer Co-Creation”, “Peer-to-Peer Communication”, and “Online Brand Communities”) are dedicated to a Social CRM context. The remaining stem from a traditional CRM context and have to be re-described and operationalized in Social CRM. This is due to the fact that the measurement process in Social CRM is significantly different compared to a traditional CRM setting (Neely, Gregory, and Platts 1995). The performance measures “Customer-Based Relationship Performance” and “Customer Lifetime Value” are two examples of that reasoning (see Table 5).

	CRM	Social CRM
Customer-Based Relationship Performance	A satisfied customer ratio (%) can be calculated with a ratio of “complaints resolved on 1 st call (%)” (H.-S. Kim and Kim 2009).	A satisfied customer ratio contains, e.g., the ratio of resolved customer problems after the first initial posts (in %) on the company’s social media profile.
Customer Lifetime Value	Borle, Singh, & Jain (2008) estimate the customer lifetime value with the following model: $\mu_{ih} = \dots + \mu_{1h}X + \dots$ X = independent variable μ_{1h} = average expended amount by customer h on purchase occasion i . μ_{ih} = “the impact of lagged dollars spent on future amounts expended.”	Due to the assumption that Social CRM has a positive effect on the profitability of a customer’s value over his relationship lifetime, a hypothesis is derived: $H_0: \mu_{1h} > \mu_{1h*}$ μ_{1h*} = new impact of lagged dollars spent on future amounts expended. The non-rejection of this hypothesis leads to an increase customer lifetime value as follows: $\uparrow\uparrow \mu_{ih} = \dots + \uparrow\uparrow \mu_{1h}X + \dots$

Table 5: Differences in operative performance measures: CRM vs. Social CRM

3.2 Classification into a Social CRM Performance Measurement System

To answer the second research question (*RQ2: What are corresponding categories that classify the identified Social CRM performance measures?*), a two-step approach is conducted by firstly, adopting a performance measurement system from current literature and secondly, by classifying the performance measures (Neely et al. 1995). Bailey (1994) uses the term classification as the process of “ordering entities into groups or classes on the basis of similarity”. The CRM performance measurement framework (i.e. a system) by Kim & Kim (2009) is adopted, which was identified during the backward reference search. It is a high ranked, widely used framework that provides a high degree of external validity. The corresponding framework uncovers a company perspective and includes four categories: (1) infrastructure, (2) process, (3) customer, and (4) organizational performance. The subsequent classification process follows the rigorous approach of Bailey (1994). Conducting a sorting procedure validates the quality of the classification. According to Petter et al. (2007) and Walther et al. (2013), a sorting procedure “can be one of the best methods to assure content validity” (Walther et al. 2013). In sequential rounds a researcher (i.e. a PhD student) as well as a practitioner classifies the Social CRM performance measures within the performance measurement system, respectively. The participants are requested to read the definitions of the 16 Social CRM performance measures, and then classify them into the descriptions of the four Social CRM categories. The calculated inter-rater reliability

³The entire list of investigated articles is presented in the appendix.

follows Perreault and Leigh's formula (1989) in order to identify problematic areas (e.g., in the definitions, wordings) after each round⁴. The sorting procedure stops when the inter-rater reliability reaches a threshold of 1.0. After each round the problematic areas are improved, re-written or even totally re-defined to enhance the intelligibility and seek clarification. The overall results of the sorting procedure are presented in Table 6.

	Round 1	Round 2	Round 3	Round 4
Inter-rater reliability	0.5	0.7	0.86	1.0

Table 6: Sorting procedure of the classified Social CRM performance measures

Table 7 is based on the findings from the sorting procedure and presents the results of the classifications, including: the adopted categories of the performance measurement system, their corresponding definitions in a Social CRM context, and the respective classified performance measures (Kim & Kim, 2009).

Categories of the performance measurement system	Definitions in the Social CRM context	Social CRM performance measures
Infrastructure	The category describes the resources, and cultural aspects of a business that are necessary to implement Social CRM.	Social Media Monitoring
		Online Brand Communities
Process	The category describes aspects that relate to the processes and activities of Social CRM.	Customer Insight
		Customer Orientation
		Customer Interaction
		Market and Customer Segmentation
Customer	The category describes the effects of Social CRM on the customers (customer perception) and the aspects, which are perceived by customers.	Customer Co-Creation
		Customer-Based Relationship Performance
		Customer Loyalty
Organizational Performance	The category describes the effects of Social CRM on the company success and business results.	Peer-to-Peer-Communication
		Customer Lifetime Value
		Financial Benefits
		Brand Awareness
		Organizational Process Optimization
		Competitive Advantage
		New Product Performance

Table 7: Classification of the Social CRM performance measures

Table 7 depicts the findings of the article. Concerning the definition of a performance measure it can be stated that the Social CRM performance measures from the categories “infrastructure” and “process” describe terms of the actual efficiency and effectiveness of an action. The Social CRM performance measures from the remaining categories describe the end result of that action. Furthermore, the identification of Social CRM performance measures has new contributions to research and practice. Firstly, Social CRM performance measures extend research within this new realm of research, provide

⁴ Inter-rater reliability by Perreault and Leigh (1989):

$$I = \sqrt{\frac{(F/N) - (1/k)}{(k/(k-1))}} \quad \text{for } F/N \geq 1/k$$

I = Inter-rater reliability, F = Number of judgments on which the judges agree,

N = Total number of judgements, k = Number of coded categories

new insights to the scientific community. Secondly, the identification of performance measures facilitates the assessment of Social CRM activities and enables new benchmark systems to compare Social CRM efforts of an organization with competitors.

4 Research Agenda

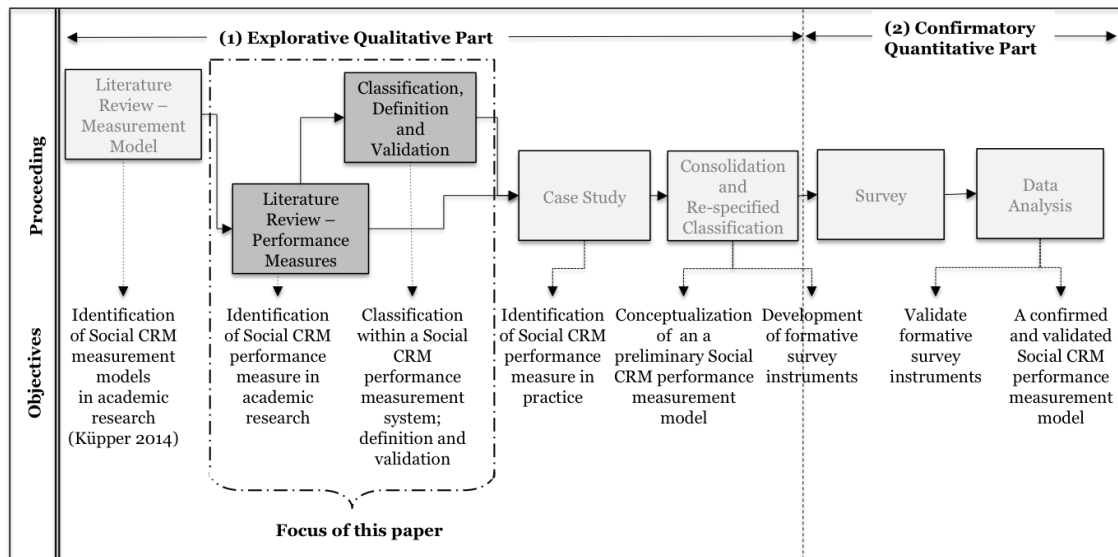


Figure 2: Research design of the overall research project

Figure 2 presents the overall research project following a two-stage multi-method approach (Creswell 2003; Sedera, Wang, and Tan 2009; Venkatesh and Brown 2013). The research design is an approach, which attempts to measure Social CRM performance. It comprises (1) an explorative qualitative part and (2) a confirmatory quantitative part. This article emphasis on the two steps within the first part of the overall research project, which is qualitative in nature and adheres to a conceptual approach.

The ongoing qualitative research describes a case study approach, conducted in cooperation with companies of a research consortium, which facilitates a practical perspective to the existing research outcome. The analysis of expert interviews from different industry sectors completes, extends, and provides new performance measures for Social CRM. Subsequently, the objective of the overall qualitative research is to consolidate the findings in order to develop a preliminary Social CRM performance measurement model.

Based on these findings, new formative survey instruments are defined and sampled in a field test. After the data collection, formative survey instruments are tested and validated a posteriori with a quantitative method (e.g., confirmatory factor analysis applied by a redundancy analysis (Cenfetelli and Bassellier G. 2009)). The question to be answered is: *Does the corresponding instruments factors constitute the factors of Social CRM performance?* Subsequently, causal relationships derived from literature and the coefficients of the influencing factors are confirmed by conducting a structural equation model, with a partial least square method, according to Hair et al. (2013). The corresponding research question is: *How are the Social CRM performance measures interrelated?*

Going beyond the overall research design, the development and implementation of key performance indicators, as operationalization of a performance measure, address the practical need for the companies. The corresponding research question is: *What are operative Social CRM performance measures within specific industry sectors?* A suited research method to answer the research question is action research, which can be conducted with the cooperating companies in the consortium (Sein, Henfridsson, and Rossi 2011).

5 Conclusion

The goal of this paper is to analyze current academic literature underlying the research topic Social CRM performance measures. A literature review is conducted to derive performance measures and to classify them within a performance measurement system. In particular, 37 articles are analyzed and synthesized. The major findings are threefold: Firstly, the analysis of current literature reveals 16 Social CRM performance measures. Secondly, a performance measurement system for Social CRM is introduced which aligns on four categories being infrastructure, process, customer, and organizational performance. Thirdly, the Social CRM performance measures are classified into four categories (see Table 7). Conducting a sorting procedure the classification process with PhD students and practitioners ensures a high degree of external validity.

Three limitations restrict the results of the research. Firstly, the search phrases are not all encompassing and possibly miss assemblies, even though they are derived from the key variables. Other and additional key variables would lead to different search phrases and therefore to diverse articles which could influence the result. Secondly, the classification is conducted with eight participants and misses an additional falsification through a focus group or a case study approach. By following a quantification analysis, this can lead to a problem of content validity, which is becoming apparent in the factor analysis. Finally, the categories of the performance measurement system are derived from CRM literature and could be a possibly inappropriate framework for the research topic. The validation of the underlying framework covers the limitations for a thoroughly rigorous literature analysis and synthesis.

Further research builds on the presented findings and is concerned with an inductive study intending to develop a preliminary Social CRM performance measurement model.

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Appendix

Article	Customer- Based Relationship Performance	Customer Insight	Financial Benefits	Customer Orientation	Competitive Advantage	Customer Loyalty	Organizational Process Optimization	Customer Interaction	New Product Performance	Market and Customer Segmentation	Customer Lifetime Value	Customer Co- Creation	Social Media Monitoring	Peer-to- Peer- Communi- cation	Online Brand Communities	Brand Awareness
Woodcock, Green, and Starkey 2011	x	x	x	x	x	x	x	x			x	x	x			x
Greve 2011	x	x	x						x	x		x	x	x	x	x
Reinhold and Alt 2012	x	x	x	x	x		x			x		x	x	x	x	
Wang 2011	x	x					x	x						x		
Trainor et al. 2013	x	x	x	x	x	x	x	x	x			x	x	x	x	
Lockwood 2011		x	x	x	x			x				x	x			
Dutot 2013	x	x	x	x	x	x		x	x		x	x	x			x
Nadeem 2012	x	x	x	x	x	x	x	x		x	x	x	x	x	x	
Trainor 2012	x	x	x	x	x	x	x	x	x		x	x	x	x	x	
Greenberg 2010	x	x	x	x	x	x	x	x	x			x	x	x	x	
Nguyen and Mutum 2012	x	x	x	x	x	x	x	x	x	x	x	x	x			x
Sigala 2004	x	x	x	x	x	x	x	x	x					x	x	
Kimiloglu and Zarali 2009	x	x	x	x	x	x	x	x			x					x
Harrigan et al. 2010	x	x	x	x	x	x	x	x	x							x
Liu, Zhou, and Chen 2006	x	x	x	x		x		x	x							
Cowan et al., 2006	x	x	x	x	x	x	x	x	x	x						
Andriole 2010		x		x				x								
J. Kim, Suh, and Hwang 2003	x	x	x	x	x	x	x	x	x		x					
Duñu and Hålmäjan 2011	x	x	x	x	x	x	x	x	x	x	x					
Coltman 2007			x	x	x	x	x		x							
Rapp, Trainor, and Agnihotri 2010	x		x			x										
Ang and Buttle 2006	x		x		x	x			x							
J. Chen et al. 2004	x	x	x	x	x	x	x	x		x						
J. J.-S. Chen et al. 2009	x	x	x	x	x	x	x		x	x	x					
Ernst et al. 2011	x	x			x	x			x							
Richards and Jones 2008	x	x	x	x	x		x	x		x	x					
Roh, Ahn, and Han 2005	x	x	x	x		x										
Chang, Park, and Chaiy 2010	x		x		x											
Tan, Yen, and Fang 2002	x	x		x	x	x	x		x	x	x					
Shannahan and Shannahan 2010	x		x		x		x			x						
Kalyar, Rafi, and Azeem 2013		x		x	x		x		x							
Zablah et al. 2012	x	x	x	x	x	x	x	x	x	x						
Palmatier et al. 2006	x	x		x		x	x	x								x
Ku 2010	x	x	x	x	x	x	x	x								
H.-S. Kim and Kim 2009	x	x	x	x	x	x					x					
Lindgreen et al. 2006	x	x	x	x	x	x	x	x		x	x					x
Jain, Jain, and Dhar 2003	x	x	x			x		x	x	x						