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Marianna Sigala,

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# Implementing social customer relationship management

## A process framework and implications in tourism and hospitality

Marianna Sigala

*School of Management, Business School, University of South Australia, Australia*

Customer  
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### Abstract

**Purpose** – This paper aims to debate the technology-driven transformation of customer relationship management (CRM) into social CRM, which entails a shift from a transactional and automational solution to a customer experience management philosophy, reflecting high levels of customer empowerment.

**Design/methodology/approach** – A literature review provides a critical analysis of the concept, tenets, aims and implementation approaches of social CRM. Arguments are summarised by developing a process-based framework for implementing social CRM.

**Findings** – By adopting a value co-creation approach that recognises the technology-fostered customer empowerment, the social CRM highlights the need to immigrate from relationship management to relationship stewardship. In this vein, social CRM implementation should support and foster dialogue facilitation and customer engagement in co-creating customer experiences. To achieve these, five approaches for implementing social CRM are proposed: collecting, analysing and interpreting customer insight; monitoring and improving the performance of CRM; developing holistic and seamless personalised customer experiences; gamifying CRM and loyalty programmes; and nurturing community relationship management.

**Research limitations/implications** – The five approaches to social CRM implementation are identified and validated based on current industry practices, theoretical arguments and anecdotal evidence of professionals' perceptions about their outcomes. Future research is required to collect hard evidence showing the business and customer impacts of these approaches.

**Practical implications** – Social CRM immigrates relationship management from a transactional to a customer experience mindset that treats customers as co-creators of value and demands the tourism and hospitality firms to exploit the affordances of information and communication technologies to collect and analyse customer data for better understanding the customer; develop customer touch points that do not only aim to sell but also primarily aim to enhance the customer interactions and experiences; consider and treat the customers and the customer communities as co-creators, brand ambassadors and stewards of relations; and motivate and enable customer participation into value co-creation processes for developing customer experiences and building relationships.

**Originality/value** – Research in social CRM is emerging, but it mainly focusses on defining its scope and identifying the functionality and adoption of social CRM technology. The paper contributes to the literature by proposing five specific approaches and a process framework for implementing social CRM. Various directions for future research are also provided.

**Keywords** CRM, Customer engagement, Tourism, Social media, Co-creation, Social CRM

**Paper type** Conceptual paper

### 1. Introduction

Customer relationship management (CRM) has become a strategic imperative in tourism and hospitality, as it can address competition, create differentiation and provide enhanced customer value (Sigala, 2005; Sheth, 2017; Debnath *et al.*, 2016). CRM is traditionally seen as a set of philosophies, strategies, systems and technologies that help firms to manage their



customers' transactions and relationships (Greenberg, 2010). Other CRM definitions (Bradshaw and Brash, 2001; Rababah *et al.*, 2010) advocate the importance of CRM in assisting firms to enhance the efficient and effective use of their marketing budgets by allocating marketing expenses to the most profitable customers. Overall, by collecting and integrating customer information for personalising customer transactions, tourism and hospitality firms can exploit CRM for improving their customers' relationship and satisfaction (Kasim and Minai, 2009; Wongsansukcharoen *et al.*, 2015); identifying and retaining the most profitable customers and improving the profitability of less profitable customers (Wang and Feng, 2012; Wongsansukcharoen *et al.*, 2015; Wu and Lu, 2012); and increasing business performance such as, customer lifetime value, customer satisfaction and retention and business profits (Lin and Su, 2003; Daghfous and Barkhi, 2009; Lo *et al.*, 2010). Hence, a CRM strategy can help firms to maximise the value generated from their customers' transactions over the customer lifetime duration. By being heavily enabled and supported by technology, CRM should keep up with technological advances and their implications on organisational operations, consumer behaviour and expectations. The CRM scope of technology has progressed from solely providing transactional and automational support to enhancing and transforming the customer experiences. The social media revolution has also empowered the customers to expect and also demand to actively participate, form and even "sell" their own experiences. However, research and practice have failed to provide concrete theoretical underpinnings and practical directions on how technology is transforming CRM.

Technological advances, the social media revolution and their impacts on consumer behaviour have revolutionised CRM (Sigala, 2011; Malthouse *et al.*, 2013; Bowen and McCain, 2015; Küpper *et al.*, 2015a; Trainor, 2012). Social media have changed the way people interact with others, the companies and communities. The firms have lost control of the customer relationship. The customers own, control and drive the conversations, and so, they influence the brand image and relations (Dessart *et al.*, 2015; Acker *et al.*, 2011), which in turn determine how the firms should personalise their experiences and develop customer relationships (Lipiäinen, 2015). These social customers, who eagerly seek to build attitudinal instead of behavioural loyalty (Mayock, 2014), do not just wish transactional benefits from relating with firms (Greenberg, 2010; Bowen and McCain, 2015). The new customers want personalised services at any device, any place and any time (Sigala, 2015a), and they heavily promote the brands when they are satisfied (Knuz *et al.*, 2017). Technologies also allow the firms to quicker and efficiently gather, analyse and exploit market intelligence for better learning the customer and personalising interactions through the customer journey (Küpper *et al.*, 2015b; Dutot, 2013; Ahuja and Medury, 2011; Chathoth *et al.*, 2014). Firms have jumped into the hype by increasing their investment on social CRM technology (Knuz *et al.*, 2017), but without knowing how to effectively use it (Küpper *et al.*, 2014; Marolt *et al.*, 2015); 11 per cent of organisations have a formal social CRM strategy (Dickie, 2013) and know less about whether they make full use of the technology (Debnath *et al.*, 2016).

Firms need to transform traditional CRM, which focusses on managing the *customer transactions* through the customer life cycle, to a social CRM or CRM 2.0, that aims to personalise *customer experiences and interactions* (Trainor, 2012; Acker *et al.*, 2011; Faase, 2011). However, although a theoretical debate about the conceptualisation and evolution of the social CRM has already started, the literature fails to give a framework and examples explaining the use of social media for implementing social CRM and meeting the needs of the new customer (Woodcock *et al.*, 2011; Malthouse *et al.*, 2013; Marolt *et al.*, 2015). As long as the ways for exploiting the social CRM tools are not studied and defined (Marolt *et al.*, 2015; Küpper *et al.*, 2015a, b,c), the firms will continue encountering problems in

implementing social CRM successfully (Acker *et al.*, 2011; Dutot, 2013; Lipiäinen, 2015). This is also true in tourism and hospitality, whereby the loyalty programmes and the CRM strategies of many firms are not only outdated but also unable to exploit the new technologies and to appeal to the Millennials (Bowen and McCain, 2015; Mayock, 2014). As there are only few industry cases (Weissenberg *et al.*, 2013) providing practical examples on how hospitality firms can manage their relations with the social customers, there is a great lack of theoretical investigation and underpinning about how firms can implement social CRM for facilitating collaborative experiences and dialogues with the “new” customers.

The paper addresses this gap by proposing five approaches and a process framework for implementing social CRM. To achieve that, the paper reviews the literature for building an understanding about the concept, the tenets and the scope of social CRM, as well as for identifying the capabilities and resources that firms have to develop for implementing it. Social CRM is argued to be built on a co-creation approach, and so, five implementation approaches are identified showing how the firms can facilitate customer engagement in value co-creation. Overall, social CRM should be implemented as a new management approach for collecting, analysing and interpreting customer insight; monitoring and improving the performance of CRM; developing holistic and seamless personalised customer experiences; gamifying CRM and loyalty programmes; and nurturing community relationship management. Finally, the implications of these five social CRM implementation approaches are consolidated in a process framework, whose value in building theory and guiding industry practices is discussed.

## 2. Social customer relationship management

### 2.1 Drivers and evolution of social customer relationship management

Despite the wide adoption of CRM in hospitality, most firms have failed to create customer attention and attitudinal loyalty (Berezan *et al.*, 2015); this is because industry CRM implementation mainly involves the provision of “me-too” offers of commoditised rewards to repeat purchases that treat customers as interchangeable commodities and bar-code numbers (Weissenberg *et al.*, 2013). Research showing the failure of CRM includes the following conditions: the customers subscribe to many loyalty programmes, but they are not loyal to any of them (Xie and Chen, 2013); the loyalty/CRM programmes are failing to significantly influence customer hotel choice and purchase behaviour (Xiong *et al.*, 2014); and firms are failing to use customer data for creating personalised customer value and for obtaining the CRM benefits (Greenberg, 2011; Bowen and McCain, 2015). Hospitality firms need to revisit their CRM implementation, as their value propositions do not any more appeal to the new Millennials (Greenberg, 2011; Bowen and McCain, 2015) who want more personalised experiences, flexibility and variety (Sigala, 2018); consider “ability to value me” and “ability to understand my needs” important for building loyalty (Weissenberg *et al.*, 2013); and continuously share, communicate and engage with peers through social media (Jennings *et al.*, 2014; Sigala and Gretzel, 2018).

Social media have also introduced new customer-centric tools that empower customers to interact with others and with businesses for exchanging resources and co-creating value in various ways (e.g. electronic word-of-mouth, crowdsourcing, service innovation and reputation building) (Chathoth *et al.*, 2014; Sigala, 2011; Acker *et al.*, 2011; Ahuja and Medury, 2011; Mosadegh and Behboudi, 2011). It is widely accepted (Choudhury and Harrigan, 2014; Acker *et al.*, 2011; Trainor, 2012; Lipiäinen, 2015; Küpper *et al.*, 2015a; Lehmkuhl and Jung, 2013) that the affordability of social media enabling the customers and the firms to engage in interactive relationships for co-creating marketing efforts and

customer experiences represents the major driver and the new social dimension of CRM. Four major functions of social media fuel the social evolution of CRM (Trainor *et al.*, 2014):

- (1) conversation (applications accelerating dialogs between firms and customers and collecting conversational data);
- (2) sharing (tools enabling users to create, exchange, distribute and receive content);
- (3) groups (tools for developing and fostering online user communities focussing on specific topics, brands or products); and
- (4) relationships (tools allowing users to network with others).

Overall, by enabling dialogues and the collection of rich information and sharing of resources, social media provide the firms with the tools to more effectively engage and co-create value with the customers and their communities. Indeed, co-creation and customer engagement are viewed to offer the new perspective of CRM, and social media are considered as the tools for evolving CRM. Co-created customer experiences are an essential component of social CRM and a mediator for materialising its business benefits (Trainor, 2012). Others (Lipiäinen, 2015; Choudhury and Harrigan, 2014; Küpper *et al.*, 2015c; Dutot, 2013) consider the co-creation of value, customer engagement and managing dialogues rather than managing customers as the new philosophy of CRM. According to Greenberg (2010), the exploitation of social media in CRM enables the firms to move the customer relationships towards a process of engaging rather than managing people with the scope of co-creating value within the customer's ecosystem. This new CRM philosophy presents a new way for firms to see customers and all market actors (e.g. customer communities and suppliers) as value co-creators and collaborate with them for co-creating personalised experiences (Sheth, 2017; Sisko and Lipiäinen, 2015). As many actors (suppliers, distributors, communities and partners) participate in value co-creation and influence consumer behaviour, the new CRM approach should also steward relationships at a customer ecosystem level rather than at a one-to-one dyadic level. The need to consider and manage the customer as an active participant in value co-creation also reveals the limitations of the traditional CRM, which views the customer as a passive consumer of value that generates firm value only through purchasing.

Consequently, firms have to manage customer relations in different ways that go beyond the one-to-one business-to-customer (B2C) relationship management approach and evolve from a transactional to a conversational relationship building mindset (Acker *et al.*, 2011; Trainor *et al.*, 2014). To appeal to the independent, social and self-sufficient customer, firms have to adopt a co-creation approach in implementing CRM and personalising experiences (Chathoth, *et al.*, 2013). Furthermore, as customers increasingly use self-service (mobile) technologies not because they wish to avoid humans and human interaction but because they want to avoid human error (Greenberg, 2011), firms have to re-think how they can integrate these technologies into a new CRM implementation approach that empowers customers to co-create reliable, valuable, personalised and meaningful customer interactions and experiences. But before identifying approaches for implementing social CRM, the paper first needs to discuss the concept and aims of social CRM.

### *2.2 Concept, tenets and scope of social customer relationship management*

The technology-driven transformation of CRM is known as CRM 2.0 or social CRM (Malthouse *et al.*, 2013; Diffley and McCole, 2015). This CRM evolution reflects a strategic shift and focus towards enhancing and personalising the customer transactions and interactions by exploiting the informational, communication and networking capabilities of

technologies (Greenberg, 2010; Sigala, 2011; Baird and Parasnis, 2011). Moreover, as the technologies also empower the customers and give them the control of the relationships, there is a need to change the scope of CRM from a relationship management to a relationship stewardship approach that recognises customers and their communities as value co-creators. However, although the 2.0 revamp of CRM requires the existence of a fundamentally different customer paradigm, it simultaneously still recognises the need to continue the operational and transaction-based capabilities of CRM for managing the customer processes along the whole relationship lifecycle (Sigala, 2011; Marolt *et al.*, 2015).

All definitions of social CRM highlight the need to consider the customer as a collaborator and actively engage him/her in relationship building and value co-creation. For example, social CRM is conceptualised as the business strategy of engaging customers through the social media for building trust and brand loyalty (Greenberg, 2010). Lehmkühl (2014, p. 67) defined social CRM as:

[...] a holistic and cross-functional approach supported by strategies, technologies, processes, corporate culture and social characteristics. It is designed to involve customers and other connected web-users in interactions on organizations' managed Social Media profiles and platforms as a means of providing mutually beneficial value.

Woodcock, Green and Starkey (2011) also explained that what social CRM adds to traditional CRM are the social features, functions, processes and characteristics that need to be exploited for enhancing the interaction with the customers, their communities, the firms and its partners.

The conceptualisation of social CRM is still emerging and debated, as it is dynamically and continually affected by advances in technologies and customer trends. To keep up with change, researchers have developed a wiki (<http://crm20.pbwiki.com>) for discussing, contributing, updating and co-agreeing on the conceptualisation of social CRM. Hence, the wiki co-created definition of social CRM represents an updated and widely accepted definition and consensus; the former claims that CRM 2.0 is 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”. Apart from recognising the technology (and specifically, social media) as a major enabler of social CRM, this definition also highlights that social CRM is not a technology application but a new mindset that:

- views the customer as a value co-creator, partner and collaborator;
- requires customer resources (such as customer-generated-data and insights) for co-creating value; and
- aims to support and facilitate customer engagement into mutually beneficial value co-creation processes within an ecosystem consisting of several trusted and transparent relations.

Hence, social CRM adopts a value co-creation approach (Grönroos and Gummerus, 2014; Sheth, 2017) that aims to support the collaborative development and management of relations within a customer ecosystem consisting various stakeholders (i.e. business partners, customers, suppliers and customer communities) who interact, exchange and integrate resources for co-creating value (Enquist *et al.*, 2015; Burdon *et al.*, 2015). The co-creation CRM approach is also in line with the evolution of marketing theory recognising social media as the empowering tools enabling customers to become co-creators, controllers and influencers of brand values and relationships (Nguyen *et al.*, 2015; Knuz *et al.*, 2017).

Hence, social CRM represents a proactive marketing approach assisting the firms to transform the ways in which they manage customer relationships from a control and push approach to a customer pull and collaborative mindset.

The differences between CRM 1.0 and CRM 2.0 (Table I) are centred around the ways they conceive the role and the management of the customers and their communities (from passive to active value co-creators); the processes for creating value (from utilitarian company-focussed transactions to the co-creation of social interactions and personalised experiences); the use and design of technology applications (from automating transactions to the use of technology for empowering customers, enriching customer experiences and supporting the operational and social aspects of interactions); the scope and focus of interactions (from company-centred operations to customer-centred ecosystems); and deep customer insight (from transactional customer profiles to holistic customer social profiles)

CRM 1.0 features/functions	CRM 2.0 features/functions
<p><b>Definition:</b> CRM is a philosophy &amp; a business strategy, supported by a system and a technology, designed to improve human interactions in a business environment</p>	<p><b>Definition:</b> CRM 2.0 is a philosophy &amp; a business strategy, supported by a system and a technology, designed to engage the customer in a collaborative interaction that provides mutually beneficial value in a trusted &amp; transparent business environment</p>
<p>Relationship between the company and the customer was seen as enterprise managing customer-parent to child to a large extent</p>	<p>Relationship between the company and the customer are seen as a collaborative effort. And yet, the company must still be an enterprise in all other aspects</p>
<p>Focus on company, customer relationship</p>	<p>Focus on all iterations of the relationships (among company, business partners, customers) and specifically focus on identifying, engaging and enabling the “influential” nodes. Thus, relationships management is viewed and managed from a service ecosystem perspective</p>
<p>The company seeks to lead and shape customer opinions about products, services, and the company-customer relationship</p>	<p>The customer is seen as a partner from the beginning in the development and improvement of products, services, and the company-customer relationship</p>
<p>Business focus on products and services that satisfy customers Insights and effectiveness were optimally achieved by the single view of the customer (data) across all channels by those who needed to know. Based on “complete” customer record and data integration</p>	<p>Business focus on environments and experiences that engage customer Insights are a considerably more dynamic issue and are based on customer data, customer personal profiles on the web and the social characteristics associated with them and customer participation in the activity acquisition of those insights</p>
<p>Resided in a customer-focussed business ecosystem Technology focussed around operational aspects of sales, marketing, support Tools are associated with automating functions</p>	<p>Resides in a customer ecosystem Technology focussed on both the operational and social aspects of the interaction Integrates social media tools into apps/services: blogs, wikis, podcasts, social networking tools, content sharing tools, user communities, tools are associated with communicating</p>
<p>Utilitarian, functional, operational Mostly uni-directional Based on a toolset (software)</p>	<p>Style and design also matter Always bi-directional Based on a strategy (corporate culture)</p>

**Table I.**

CRM 1.0 Vs CRM 2.0

**Source:** <http://crm20.pbwiki.com>

that companies can obtain through Big Data that enables them to understand not only what and when people buy/consume (transactional data of traditional CRM) but also why they buy, how, when, with whom, why they consume experiences and how they feel about these experiences. By observing customers in their private and social lives, Big Data empower firms to not only identify the customer needs and actions but also explain the reasons of these needs, how these change over time and the drivers behind customer decision and actions (Wieneke and Lehrer, 2016). Hence, social CRM requires the collection and interpretation of customer data that are located and produced in various customer interaction points outside of the firm's boundaries. Moreover, because of its value co-creation perspective, social CRM also demands the development of a broader understanding of customer value. Under a CRM 1.0 approach, customer value is limited to the value generated by customers through the transaction processes (i.e. measurement of customer lifetime value and its use for segmenting customers based on their economic/transactional value). However, as the customers co-create value in various ways (e.g. by engaging in new product development, e-word-of-mouth [eWOM] and crowdsourcing), social CRM should also include and measure the social, emotional, cognitive and symbolic aspects of customer value (e.g. customers should also be evaluated and rewarded for the business value they generate by spreading eWOM, forming and influencing online opinions, brand image/reputation and purchase referrals).

Overall, CRM 1.0 focusses on products/services and the firms' value creation processes, while social CRM centres on the customers' experiences and value co-creation processes; the context of value co-creation, i.e. the customer ecosystem; and the interactions amongst the various stakeholders of the customer ecosystem that facilitate resource exchanges for value co-creation. Thus, social CRM is in line with the tenets of co-creation, emphasising that value is not pre-produced and embedded within products/services, but instead is co-created through actors' interactions. In this vein, the social CRM emphasises the need to design, manage and oversee value co-creation opportunities by supporting and stewarding actors' interactions within the customer ecosystem. Instead of managing customer relations for generating business value, the priority of social CRM is how to facilitate interactions, as well as manage and motivate customer engagement in value co-creation. Hence, the customer ecosystem and how it is designed and managed for enabling actors' interactions and dialogues are at the core of social CRM.

### *2.3 Social customer relationship management implementation*

To implement social CRM, firms should (Malthouse *et al.*, 2013; Sigala, 2011; Ahuja and Medury, 2011; Trainor, 2012; Dutot, 2013; Choudhury and Harrigan, 2014):

- treat and consider their customers and customer communities as value co-creators and co-managers of relationship;
- create and support value co-creation processes and interaction opportunities amongst customers and other stakeholders within the customer ecosystem;
- motivate, reward and train customers based on their co-creation engagement so that they are capable and willing to participate;
- adopt a broader definition of customer value that recognises the co-creation value of customers that goes beyond the transactional processes and use this wider conceptualisation of value for customer evaluation, segmentation and rewarding; and
- enrich customer insight and improve decision making by integrating and using Big Data into internal processes and databases.



However, apart from these general social CRM guidelines, the literature has failed to provide specifications on how to design co-creation opportunities and motivate customer engagement. In her literature review, Marolt *et al.* (2015) concluded that research in social CRM has failed to produce concrete results about the specific industry use and adoption of social CRM, while many critical concepts (such as customer engagement) lack specific operationalisations and measurement. Recent studies (Küpper *et al.*, 2015a, b, c) also focus on the technical rather than the business or marketing aspects of social CRM as they concentrate on identifying and assessing the social CRM technologies and functionalities and firms' abilities in exploiting the latter.

In summary, research has concluded (Küpper *et al.*, 2015b; Trainor *et al.*, 2014; Marolt *et al.*, 2015) that the following social CRM resources and capabilities are required for implementing social CRM:

- relational information processes referring to the firms' tools and abilities to monitor, capture, analyse and exploit rich customer and market insights, information systems infrastructure and integration;
- internal (with cross-functional employees) and external (with customers and customer communities) communication capabilities; and
- ability to manage various engagement management issues, including management of customer communities, employees, customer engagement, user permission and ethics/privacy.

Recent studies (Wongsansukcharoen *et al.*, 2015; Küpper *et al.*, 2015a, c; Trainor *et al.*, 2014) have also confirmed the impact of these social CRM capabilities and resources on achieving business outcomes related to both customer performance metrics (e.g. market share, customer retention and loyalty) and organisational performance metrics (e.g. financial benefits, brand awareness and equity). However, this evidence is based on the managers' perceptions about the business impacts of these social CRM resources and not on hard data.

Nevertheless, although these studies have identified the technological and organisational tools and capabilities required for implementing social CRM, they have failed to specify ways in which the firms can use these technological resources for designing value co-creation processes and motivating customer engagement (Küpper *et al.*, 2015c). Given this lack of business practice, this paper proposes five approaches to social CRM implementation.

### 3. Approaches to social customer relationship management implementation

The limited literature and industry examples were consolidated into five approaches to social CRM implementation, because of the following reasons:

- They are compatible with the co-creation tenets, conceptualisation and scope of social CRM that emphasise the need to actively engage the customers (and other ecosystem stakeholders) in value co-creation and relationship *stewardship* processes.
- They show how the firms can exploit the previously identified CRM resources and capabilities (i.e. relational information processes, communication and engagement management abilities) for supporting and facilitating customer engagement in value co-creation.

The following sections discuss these five approaches, the ways in which they satisfy the above criteria and their managerial and research implications. Finally, arguments are

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consolidated into a process-based framework that frames social CRM implementation into an input, process and outputs perspective.

### 3.1 Collection, analysis, interpretation and use of customer insight

Empowered by new technologies, the social CRM provides the tools and the strategies for collecting meaningful, accurate, real-time and holistic customer insight. Indeed, social media and the new technologies represent new sources of information (Sigala, 2011), enabling the firms to collect new levels of customer insight for creating personalised experiences (Knuz *et al.*, 2017) and managing the relationships and interactions with their customers (Christopher *et al.*, 1991; Gummesson, 2017). The use of this customer (generated) data and insight represents one of the major resources and tools for implementing social CRM (Table I; Trainor *et al.*, 2014; Choudhury and Harrigan, 2014; Küpper *et al.*, 2015a, b,c; Acker *et al.*, 2011) that is generally called as a relational information capability (Marolt *et al.*, 2015). The importance of this capability in assisting firms to increase customer relationship performance and engagement is confirmed by recent studies (Wongsansukcharoen *et al.*, 2015; Harrigan *et al.*, 2015; Rodriguez *et al.*, 2014; Küpper *et al.*, 2015a; Wieneke and Lehrer, 2016). Furthermore, the following studies provide more specific guidelines on how these new technological affordances for collecting and using customer (generated) data can help the firms to transform their CRM implementation from a transactional to a social dimension.

Greenberg (2010) argued that social media can change the face and the nature of what information is gathered, what companies can learn from that information and how they can apply that information for customer management (for example by conducting social media brand monitoring, online buzz measurement and sentiment analysis of customer feedback/content). Sigala (2011) advocated the benefits of collecting and using user-generated content (UGC) for managing the customer relationships through all stages of the customer life cycle (namely customer identification and acquisition, customer enhancement and development and customer win back). Baird and Parasnis (2011) provided evidence of the financial benefits and the increased effectiveness that marketing campaigns can attain when the latter are designed by using insight generated by online customer data. To achieve this, three types of online customer information need to be used for implementing CRM in a more information-empowered approach (Sigala, 2011): *information about* the customer, which refers to information related to customer profiles, needs, expectations and requirements; *information for* the customer reflecting personalised messages and communication that the firm needs to develop for personalising customer interactions, experiences and offerings; and *information from* the customer referring to customer feedback about the offerings, the company and their experiences. Greenberg (2011) added that social media can also help the companies to further enrich their customer databases by collecting information about:

- the social profile and the personality/identity of the customers (e.g. their social graph/network, i.e. weak and strong ties with other people, what people like, do and feel);
- the customer experience map, which represents and captures the granular interactions of individual customers in multiple environments, with multiple stakeholders and at multiple touch-points; and
- the individuals and groups' sentiments.

Recently, a new stream of research has emerged examining how the implementation of CRM can be enhanced by integrating and using social media metrics and analytics into the traditional business analytics: e.g. Nadeem (2012), Dutot (2013) and Ahuja and Medury

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(2011) provide several examples showing how to use social analytics for increasing the level of online customer engagement and interaction and supporting the implementation of social CRM.

Overall, the numerous social media metrics and analytics suggested for implementing social CRM are grouped under the following five categories:

- (1) *Customer experience metrics*: They show the type of customer experiences (such as sentiment analyses, keyword/trend analyses). These metrics can help the firms to monitor the feelings and the type of experiences that the customers live (e.g. the number or the ratio of positive in relation to negative customer comments); identify and measure the customer trends being diffused and dominating the market (e.g. the number of discussions related to a topic); and measure the diffusion and spread of business ideas/messages (e.g. how many people and what they discuss about a specific action of a firm).
- (2) *Customer interaction metrics*: They reflect the level at which customers engage themselves in the online communication process. For example, the metrics related to the volume (online buzz) and the type of audience engagement (e.g. number of likes, comments, shares per type of customer and per type of message/post), as well as the metrics measuring the conversion of online engagers to purchasers (e.g. the percentage of online communicators or readers that become online bookers), can help the firms to better manage the customer communication and to nurture profitable relations with the most valuable customers by identifying who is the valuable customer as an online communicator, marketer, distributor and/or opinion leader and understanding the ways for enhancing the level of customer engagement in online interactions and communications.
- (3) *Customer satisfaction metrics*: Examples include type and number of online complaints and the percentage of complaints that get resolved within specific time and after how many online interactions. It can critically help firms to monitor and manage their social care and social customer service strategies; for example, numerous firms have started using the Twitter and Facebook as an online concierge and customer service touch point for receiving customer requests, complaints and resolving them.
- (4) *Online reach metrics*: Examples are the number of online impressions achieved per type of online communication and within how much time. These metrics measure the communication velocity, the virality and the size of reach of online communication strategies, which in turn can be used for guiding the firms on how to design and improve the effectiveness of their online customer communication campaigns.
- (5) *Online financial metrics*: Examples are average cost per website visitor, average cost per new acquired customer and average revenue per customer. They can be used for measuring the return on investment and improving the design of online CRM campaigns that are undertaken for building and managing the customer relations throughout all the stages of the customer relation life cycle (i.e. acquisition, retention and win back).

However, the tools for collecting and analysing data go far beyond social media. The “always connected” customer creates digital footprints of his/her online activity in various devices (e.g. smart phones, computers and palmtops), which in turn provide numerous other sources for collecting customer insight. Moreover, the tools available to handle the volume,

the velocity and the variety of data have greatly improved in recent years, and firms are now able to synchronise and personalise customer engagement in multiple interaction points and channels (Knuz *et al.*, 2017). Big Data also empowers the firms to gain a much more holistic, 360° and comprehensive understanding of their customers and to immediately identify, analyse, interpret and respond to the customer trends, complaints and requirements in a more interactive, personalised and real-time approach. Big Data can enable tourism firms to enhance decision-making by improving existing tourism statistics (better quality); distinguishing smaller areas and timeframes (more detail); increasing frequency and timeliness; reducing the market research burden; and producing new statistics and indicators (e.g. of tourist flows and experiences). Nevertheless, although Big Data is widely recognised as a major driver of innovation, customer satisfaction and business performance (Akter and Wamba, 2016), research identifying the firms and staff's capabilities for exploiting Big Data (Wieneke and Lehrer, 2016) and developing data-driven applications in tourism is still limited (Sigala and Gretzel, 2018).

Research is also required to identify the factors inhibiting and/or facilitating the tourism firms to harness big data and implement social CRM. Employees' understanding, capabilities and trust on how to use big data and inject them into their daily and strategic decision-making are identified as the major obstacles of big data exploitation (Akter and Wamba, 2016). Hence, research should be directed in identifying the human resource capabilities, motivations and skills required for exploiting Big Data. Successful big data exploitation depends on the size of available data (Knuz *et al.*, 2017) but more critically on the leadership teams that identify business problems and operationalise them into required data; set clear goals and define what success looks like; and ask the right questions. As Big Data does not erase the need for vision and human insight, future research is required to investigate how firms can nurture, develop and motivate this human creativity and collaboration in using, interpreting and putting the right Big Data into business action. Future studies should urgently explore the organisational and governance factors (i.e. organisational structure, cross-functional teams, leadership and staff empowerment) that can impede or support the use of Big Data. Furthermore, tourism educators should explore the appropriate educational pedagogies and transform their teaching approaches for getting the tourism graduates "Big Data ready". As privacy and ethical concerns also represent a major hurdle to big data exploitation, research should investigate the big data implications on policy-making, legislation development and business ethics.

### *3.2 Monitoring and improving the performance of customer relationship management*

Social media provide customers with the platform and the tools to express, discuss and share their opinions about numerous business practices (Knuz *et al.*, 2017; Acker *et al.*, 2011). This customer feedback is a valuable resource used for several purposes such as monitoring own and competitors' performance; engaging in continuous process improvement; and responding to customers' requirements, expectations and complaints. In accordance to the scope of social CRM (Table I), emphasising the need to use technology-collected data for increasing customer engagement in value co-creation, several studies also highlight the use of UGC for monitoring and improving CRM practices. For example, Berezan *et al.* (2015) showed how eWOM and customer-to-customer (C2C) communications shared in customer review websites can be analysed for monitoring CRM performance and for unravelling the CRM features and factors determining customer satisfaction or dissatisfaction. Monitoring online channels for identifying and correcting issues that cause frustration and dissatisfaction to CRM customers was considered as an indispensable task nowadays, as

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problems can easily and quickly escalate through the rapid spread of eWOM (Berezan *et al.*, 2015). Ahuja and Medury (2011) have also shown how the firms can extract and mine customer comments posted in corporate blogs for gauging customer sentiment and supporting their decisions related to segmentation and CRM campaign management. Although these are only two of the few studies advocating so far the role of UGC for improving CRM performance, there is a plethora of studies discussing the role and the urgent need to use online data for marketing purposes (see review by Akter and Wamba, 2016; Wieneke and Lehrer, 2016). In reviewing the literature, Akter and Wamba (2016) identified various types of Big Data and discussed their applications and challenges for implementing real time marketing, including changes in performance management mindsets; organisational culture; customers' roles in marketing; investments on technological analytical tools; and interpretive and business intelligence skills. However, the literature has been limited in examining how to specifically implement these issues (Akter and Wamba, 2016).

Overall, this approach to social CRM implementation is in line with the Big Data trends and the tenet of social CRM recognising that the customer empowerment entails the transformation of CRM from relationship management to relationship stewardship practices that use customer generated data for continuously overseeing, monitoring, sensing, understanding and influencing relationships within the customer ecosystem. Practically, this approach argues the use of big data for constantly monitoring and redesigning CRM and loyalty programmes. For example, Big Data can be used for sensing the changing market and identifying the contextual variables influencing the performance outcomes of CRM and loyalty programmes. The use of big data for the continuous update of social CRM is imperative given the fast technological advances and the continuously changing consumers' needs that make business practices rapidly redundant and inefficient (Bowen and McCain, 2015).

Finally, the implementation of social CRM can be further expanded by actively engaging customers in the design of CRM and loyalty programmes. This is compatible with the social CRM tenet, recognising the need to increase the customer engagement into several value co-creation processes (including service innovation and design operations). Wongsansukcharoen *et al.* (2015) argued that social CRM should be embedded into all business functions (by converting them into open innovation, social marketing and PR; social sales and social customer service), but they gave no guidelines on how to practically implement that. A recent example from the industry is the Accor's project ([www.accortakeoff.com](http://www.accortakeoff.com)) inviting hospitality graduates to participate in its CRM strategic design processes by proposing ideas about how they envision the CRM strategy of the future. To instil the graduates' interest and motivation to engage into this initiative, Accor runs an online competition that features several esteemed awards for the students submitting ideas. Although Accor empowers only a selective group of people to participate in the future design of CRM (i. e. experts versus all the loyalty members, a crowdsourcing versus a crowdsourcing approach), this initiative is an interesting example showing how the firms can expand customer engagement into various value co-creation CRM processes. Nevertheless, converting customers into CRM co-designers raises several research and practical questions, such as which are the operational requirements and the tools required to integrate customers into CRM processes? What are the impacts of customer engagement on various CRM performance outcomes, e.g. customer loyalty/retention, sales, business performance, differentiation? How firms can motivate, reward, train and

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support, as well as select, appropriate customers for participating in CRM value co-creation processes?

### *3.3 Developing holistic and seamless personalised customer experiences*

CRM is widely recognised as a business strategy that uses information and communication technologies (ICTs) to provide an enterprise with a comprehensive, reliable and integrated view of its customer base so that all processes and customer interactions help maintain and expand mutually beneficial relationships (Sigala, 2005). The ICT advances not only allow the firms to collect customer intelligence and create a more holistic customer profile but also increase the number of channels through which customers can communicate with the firms and receive customer services (Sigala, 2006). The “always connected” customer also expects personalised services at any place, any time and any device and the provision of a seamless experience irrespective of the channel(s) being used. For example, guests may use a website for booking a room, but later they may wish to access and change their reservation through a tablet; check-in through a smart phone while driving to the hotel; and access their customer loyalty profile online for buying and paying extra hotel services by using their loyalty points. This customer expectation demands the implementation of social CRM within a multichannel environment. Awasthi and Sangle (2012) described the CRM evolution through the use of the following technological channels for delivering CRM services: CRM; multichannel CRM; eCRM; and mCRM.

Apart from operating multiple interaction channels, social CRM should also ensure the provision of updated and personalised information across all channels and customer touch points. Customer interaction channels should be technologically and functionally integrated with the related business operations, which in turn requires major process re-engineering and organisational restructuring (Sigala, 2011; Küpper *et al.*, 2015c). Although research has failed to examine the technical and organisational issues related to CRM implementation within multichannel environments (Awasthi and Sangle, 2012; Marolt *et al.*, 2015), several studies (Rodriguez *et al.*, 2014; Sigala, 2011; Malthouse *et al.*, 2013; Sashi, 2012) advocate the need to redesign and organise technological tools and applications around the customer instead of business processes. To that end, social CRM requires the integration of social media functionality and customer data with existing ICT applications and customer databases and an understanding of the customer processes for redesigning technology infrastructures around the customer experiences and not the business processes/transactions. The following examples illustrate how ICT should be redesigned for supporting a seamless personalised experience throughout the whole customer service journey and how the firms can effectively use the previously identified social CRM resources and capabilities (i.e. relational information resources, communication and engagement management) for increasing customer co-creation participation.

Sigala (2006) described several examples illustrating how hotels can use ICT for providing personalised services and interactions during the whole circle of the hotel guest experience (i.e. before arrival, during the stay and after the stay). Similarly, many airlines have developed ICT applications that enable customers to participate in the design and co-creation of personalised trip experiences during the whole passenger process cycle (i.e. before, during and after the trip) by integrating their multiple business operations and interaction channels around the passengers’ processes. For instance, before the trip, passengers can use ICT applications for booking flights; buying in-flight services; getting alerts about gate changes and flight delays; and checking-in, select seating and download boarding passes. During the flight, ICT applications enable passengers to purchase in-flight entertainment and catering by paying with their miles or credit cards. After the flight,

passengers can use ICT applications for receiving services and information such as, airport information, transit services, flight updates and changes and destination information. Similarly, tourism destinations are developing location-based social media applications that enable tourists to co-create their destination experiences during their whole trip cycle (before, during and after the trip). For example, a popular mobile application connects and enables the skiers to interact for experiencing a ski resort in new, interactive and fun ways. The application captures the ski and snowboard experience of skiers based on radio frequency identification tags included in ski passes. Users can connect with other people using the social media for sharing, discussing and reading content (photos, videos, reviews, guides, ski school experiences, etc.) that can in turn help them to design their ski experience on real-time (during the trip), to pre-plan their ski experience (before the trip) and/or to reflect and provide feedback on their ski experience (after the trip).

Overall, the multiplication of ICT tools and devices affords firms with more touch points for interacting with customers and including them in various co-creation processes. These customer touch points should be viewed as an opportunity to maximise customer value; enhance customer experiences throughout the whole customer journey; and to collect more data and better learn the customer. This approach also requires firms to divert their management focus from a business operations-centred approach to a customer-centred experience process management perspective (i.e. compatibility with the tenets and scope of social CRM, [Table I](#)). To serve these social CRM goals, ICT empower firms to implement social CRM in the following ways:

- Deliver consistent business processes across all media and all channels.
- Integrate multi-channel customer interactions to build a learning customer relationship and provide seamless personalised service.
- Obtain a more holistic understanding of the (social) profile of the customer.
- Obtain and use rich data for better calculating the customer value (that expands beyond the transactional value of the customers).
- Design personalised transactions and enable customer engagement into value co-creation activities at every of the many customer touch points and throughout the whole customer journey, i.e. before the trip (e.g. booking, destination information, trip planning, room customisation, ordering spa services and hotel check-in); during the trip (e.g. pay bills, access guest account, online concierge services and trip planning/rescheduling); and after the trip (e.g. provide feedback, share customer reviews and experiences and check loyalty card points)

In addition, several social media applications can identify the customer's location (e.g. the check-in functionality of Foursquare or Facebook) and so, provide a better understanding of the context of customer interactions and experiences (e.g. with whom, why, when and what experiences customers live). By exploiting these technological affordances, the firms can further personalise and localise their customer interactions and services, enrich the customer experiences and facilitate customer co-creation. For example, Ritz Carlton developed a smart phone application enabling the guests to check-in in various hotel facilities (e.g. bar, spa) or its surrounding destination to receive localised information; access concierge services (e.g. booking local attractions); and scan three dimensional codes (printed on restaurant napkins or placed on walls) for accessing contextualised information (e.g. about what they are eating, viewing or experiencing) and uploading content (photos, videos and comments) for sharing and discussing their experiences with other guests who are also "checked-in" the same location. The Starwood Keyless application enables guests to use a smart device or an

Apple's iWatch to make bookings, access their loyalty profile, check-in and use their phone or iWatch to open the room door, pay hotel bills, customise their in-room facilities and expect the same in-room design in every Starwood hotel they visit. This is a great example showing how mobile apps integrated into social CRM can enable hotels to personalise customer interactions, enhance guests' experiences and empower customers/communities as value co-creators. Moreover, these seamless and personalised experiences do not only provide superior guest service but also create structural relational bonds and switch costs, which in turn lock-in guests with the specific hotel chain and make it more difficult for them to change hotel provider. Such SoLoMo (social, local and mobile) applications have become very popular in tourism and hospitality (Sigala and Gretzel, 2018), as they can enable various co-creation processes and enhance the customer experience and interactions with the brand, other customers and the brand community.

Overall, these social CRM practices highlight that tourism and hospitality firms should view every customer touch point as an opportunity to maximise the business value generated from and by the customers (e.g. by enabling cross- or up-sales, and exploiting the social value of customers, e.g. e-WOM, online influence and networks); enhance and provide seamless multichannel customer experiences; and support customer engagement in co-creation. Consequently, implementing social CRM requires the integration of ICT and social media into existing technological platforms and organisational functions to provide and facilitate co-creation processes that personalise both customer transactions and customer interactions during the whole customer journey. To achieve that, social CRM applications should enable organisations to manage and coordinate customer interactions across *multiple channels, departments, lines of business and geographies* to maximise the value and the contribution of every customer interaction that ultimately would drive superior corporate performance. Thus, this approach to social CRM implementation is compatible with its scope and tenets (Table I) that emphasise the need to exploit technologies to manage the customer value ecosystem and processes rather than the business operations/processes; enable value co-creation by engaging customers into all business operations that expand beyond the purchase stage; and divert the focus from solely managing functional/utilitarian processes to facilitating social, emotional and symbolic customer experiences. However, it is still unknown how customers are motivated and supported to engage into value co-creation activities and how co-creation influences CRM effectiveness. Thus, future studies are required to investigate the factors influencing and/or inhibiting the customers to get engaged into value co-creation processes, as well as the impacts of co-creation on CRM performance metrics such as customer loyalty, brand engagement, switch costs, development of structural and emotional and functional bonds with the firm.

#### 3.4 Gamification of the customer relationship management and loyalty programmes

Gamification is the use of game-play mechanics for non-game applications (Deterding *et al.*, 2011) for motivating and directing users' behaviour towards desired "play" tasks. This is because the game-like techniques and mechanics (e.g. scoreboards, points and personalised fast feedback) and the players' "situational" involvement (i.e. user active control and two-way communication) make people feel more ownership and flow when engaging with the "play" tasks. Flow is an enjoyable experience resulting in immersion in a task, a sense of control and increased learning, exploratory and participatory behaviour. When in flow, people are focussed on the flow-eliciting interaction, loose sense of time and filter out thoughts and stimuli. Thus, by gamifying marketing practices, the firms can create pleasurable experiences that can result in numerous marketing benefits (Sigala, 2015b; Hamari *et al.*, 2014) such as increased and active customer engagement with the "play"



tasks; enhanced customers' brand recall and awareness; and positive attitudes, purchase intentions and actual sales. This is because gamified marketing applications can better attract users' attention to the interactive marketing content and engage the users into cognitively learning (Sigala, 2015b). Indeed, gamification is increasingly integrated in marketing strategies (Sigala, 2015b) by converting marketing activities into positive and intrinsically motivating gameful experiences (play tasks), which in turn (Hamari *et al.*, 2014; Sigala, 2015b) instil the customers' engagement and participation in marketing activities (converted into play tasks) and direct the customer behaviour towards desired business results (i.e. enhanced customer awareness and learning of the brand, increased customer activity, social interaction, consumption and purchasing actions). Overall, marketing tasks can be gamified by using and matching game mechanics with the users' personality and needs to (Sigala, 2015b) make the marketing practices more edutaining, fun and interesting; enhance customer engagement in marketing activities; and increase customer motivation to adopt desired business behaviours.

Gamification is frequently used in marketing under two application types (Terlutter and Capella, 2013): *advergames*, full computer games specifically designed to promote goods/ideas, where the entertainment content mimics traditional game forms; and marketing practices with *gameful designs*, which are only partially based on game elements. Tourism and hospitality firms have used both types of gamified marketing applications for (Sigala, 2015b) increasing customer loyalty and repeat purchases; developing and enriching customer relations and experiences; building a customer database and collecting and enriching information of customer profiles and behaviour. Gamification is in line with the tenets and features of social CRM (Table I), because it recognises the customer as a value co-creator and applies game mechanics for motivating customer participation in value co-creation.

Gamification is currently recognised as an effective way to enhance (social) CRM (Küpper *et al.*, 2015a, b), but the literature has failed to give examples on how to use it for building customer co-creation. The following examples show how gamification can support the social transformation of CRM and loyalty programmes by motivating customer engagement in value co-creation and generating customer insights.

JetBlue uses gamification for converting its loyalty programme (called TrueBlue) into a social loyalty programme that exploits the eWOM and the crowdsourcing affordances of social media for enhancing the customers' loyalty and engagement with the company and building its customer database by generating new customers and collecting customer information from the customers' Facebook profiles and online activities. To implement the social loyalty programme, the airline Facebook page is designed with the following funware (i.e. game mechanics that instil motivational affordances): the TrueBlue members are invited to register their loyalty profile on the JetBlue's Facebook page; loyalty members are motivated to do this, because several Facebook activities (e.g. uploading or tagging content) can earn them loyalty points (Table II); and customers are allowed to exchange all the loyalty points gained through their Facebook activities for free services, flight upgrades and status privileges. In other words, gamification is applied for converting Facebook marketing tasks into play tasks, whereby points/rewards are used for motivating the customer engagement in value co-creation (as co-marketers and co-distributors of marketing content). Hence, gamification supports the implementation of the social loyalty programme by motivating and directing customer behaviour to become active co-creators of marketing value by generating and distributing marketing content or UGC; developing and fuelling online customer interactions and dialogues about the firm, that in turn boosts the online marketing efforts of the firm; and attracting "friends" at the firm's Facebook page for

Customer  
relationship  
management

Company	Examples of gamification funware design and game mechanics
JetBlue	Customers who 'check-in' at any airport location of the JetBlue through their Facebook profile earn 25 TrueBlue points into their loyalty programme. Customers can also earn JetBlue badges when they 'tag' a travelling companion in their Facebook profile. A location-based social media application (called Go Places) also allows the customers to gain loyalty points by contributing/posting content on the JetBlue Facebook page
Marriott	Members of the Marriott loyalty programme have to link their social profiles/ accounts in various social media (i.e. Facebook, Twitter, Instagram and Foursquare) with their Marriott Rewards account, and then they can earn Marriott Rewards points (only a max of 2,000 points per 30 days) by: Sharing or retweeting our posts to your Facebook or Twitter feeds each day Checking into properties on Facebook every day they visit Posting a photo each day to Instagram Using #MRpoints #LoveMarriottRewards, #RenHotels or #AutographHotels in their daily Facebook, Twitter and Instagram posts Liking and following selected brands and properties in Facebook or Twitter
Carlson	On May 13th 2015, Club Carlson (the loyalty programme of the hotel chain) has turned its Twitter account into a private 24-hour party called #HashtagHotel. In advance of the "party," the first 15,000 people who connected using Twitter and follow @ClubCarlson also received 1,000 bonus Gold Points to add to their loyalty account. During the Twitter "party," Carlson also gave away Gold Points, Elite Status and other travel items such as luggage, noise-cancelling headphones and cameras. Carlson also gave participants the chance to chat live with travel experts to get "tips, tricks and insight on how to get the most out of your travels"
Lufthansa	The funware application (called Blue Legends) connects frequent flyers by inviting them to virtually check-in (to airports, lounges and Lufthansa flights through Foursquare flights) for getting points and badges. For example, passengers are rewarded with ranks and badges for regularly checking-in virtually to Lufthansa sites. For example, users can become "Expert Pilots" on the routes they fly most frequently. Early risers who check-in before 6 a.m. are awarded the "Early Bird" badge. Anyone who racks up more than 388,000 kilometres with Lufthansa receives the "To the Moon" badge, travellers who check-in most frequently to Lufthansa sites can become true "legends of the skies". Users can also share their journey/ flight information and travel performance/scorecard with others via social networks. By checking-in and sharing flight information in social media, travellers not only generate marketing content about the airline, but they also distribute and discuss this content within their online social networks/friends

**Table II.**  
Gamification  
examples of social  
CRM

increasing the page's traffic and usage. The gamified social loyalty programme exploits the crowdsourcing affordances of the social media for converting and exploiting the customers as online co-marketers, co-creators and co-distributors of marketing content, while simultaneously offering them an entertaining and joyful way to interact with the firm and others, learn about the brand and increase their attachment and loyalty to the firm.

Marriott incorporated funware design into social media marketing strategies to enhance the customer experience and interactions with loyal guests. Marriott gamified its loyalty programme (Marriott Rewards Plus Points) to motivate and reward loyal customers who generate and distribute online content about its brand (Table II), i.e. gamification is used for motivating the customers to crowdsource UGC and increase customer retention and loyalty. Marriott exploited the social media affordances and the game mechanics for creating a collaborative relation with the customers, engaging them into co-creation and converting them into online brand co-marketers and ambassadors. Marriott also enhances guest loyalty by rewarding the guests' co-marketing online activities and interactions with the brand. The gamification of the loyalty programme further expands the social CRM implementation by

supporting the collection of customer data (customers' social media profiles and online activities) and enriching databases with insight about the customers' ecosystem and context of their experiences. Specifically, when customers link their social media account with the Marriot Rewards Plus Points programme, the technology application receives information such as guest's public profile; friend list, e-mail address, news feed, relationships, relationship interests, birthday, notes, status updates, check-ins, education history, events, groups, hometown, interests, current city, photos, questions, religious and political views, personal description and likes. By collecting and using this customer data, Marriott can significantly better personalise and contextualise its guests' interactions and relations.

Carlson used a similar funware design for gamifying its loyalty programme and motivating its loyal guests to crowdsource online content; become online brand ambassadors; and increase their online interactions with the brand. Carlson rewards customers for engaging into co-creation activities only during specific time periods and according to the marketing results that the company wishes to achieve at every single time (Table II). Hence, the Carlson's gamification strategy is more contextual, specifically designed to meet the company's contemporary marketing aims.

Lufthansa created a gamified location-based social media application, which represents an interesting advergame example designed for (Table II) rewarding customers for their repeat usage and purchase of Lufthansa flights and for generating and crowdsourcing UGC, online dialogues and promotion about the firm and its services (i.e. customer co-creates value through brand exposure and awareness). To motivate the travellers to get engaged into these crowdsourcing/co-creation marketing practices, the gamified funware combines two types of motivational affordances: the provision of extrinsic rewards (e.g. points and badges) and the achievement of intrinsic value (e.g. the travellers can increase their self-esteem, ego and social recognition by distributing information about their flights, itinerary plans and journeys within their peers and friends' social networks).

However, as gamification is applied in marketing but not in CRM yet (Sigala, 2015b), research needs to guide firms how to design and incorporate effective funwares into CRM and loyalty programmes. Studies could examine how to select and match the various types of game mechanics with the different customer/players personalities so that the funware design can generate positive motivational affordances. Research should also study the impacts of various gamification designs on social CRM performance. This is because the previous examples of gamified social CRM adopt a superficial "pointsfication" approach (Sigala, 2015b) that motivate customer engagement as long as extrinsic rewards/points are provided. This implementation misses the elements of playfulness and fun experiences (which can make a game more effective), and it can also lead to several detrimental behavioural effects such as negative impacts on motivation; lowered intrinsic motivation; and diminished people's behaviour, i.e. short-term activity increase, but reduction in long-range interest and use of a product/service. This is because once you start giving someone a reward, you have to keep him/her in that reward loop forever (Deterding *et al.*, 2011), because when the extrinsic rewards stop, the user behaviour is worse, as the users are less likely to return to the behaviour without the external reward (Sigala, 2015b). "Pointsfication" also leads to decreased effectiveness and differentiation of the traditional hotel loyalty programmes (Xiong *et al.*, 2014; Berezan *et al.*, 2015), mainly because all of them solely provide exactly the same functional and extrinsic benefits (i.e. the achievement of points for repeat purchases). This pointification creates limited scope to the loyalty programmes to be differentiated from each other and also generate customer loyalty to the pointification programme and not to the hotels (Weissenberg *et al.*, 2013). To collect and exchange points, the customers become members of several hotel loyalty programmes (but they are loyal to

none), and ultimately, the role of the loyalty programmes to influence decision-making and hotel selection is diminished (i.e. whatever hotel is selected, the guest has a card to collect points). Consequently, the sole provision of extrinsic points/rewards is not an appropriate way to design and implement effective and competitive CRM and loyalty programmes. Instead, an effective implementation of social CRM should aim to lock-in customers not only by providing functional/utilitarian benefits but also by creating emotional and structural bonds with the firm, its staff, other customers and/or the brand communities. However, as we do not know how game mechanics and funware design can generate social bonds and ties between customers and the brand, research should explore this.

### 3.5 Community relationship management

Social media affordances currently enable firms to implement social CRM by creating, nurturing and maintaining brand communities, which in turn can increase customer engagement and loyalty with the brand. The use of customer communities for enhancing customer engagement and implementing social CRM is heavily advocated (Küpper *et al.*, 2015b; Trainor *et al.*, 2014; Diffley and McCole, 2015; Harrigan *et al.*, 2015; Acker *et al.*, 2011; Ang, 2011), but no study elaborates why customer communities can benefit and be integrated into social CRM. Hence, the following section reviews literature on (online) brand communities for investigating the latter's implications on social CRM.

An online brand community is an expanding phenomenon, which can be defined as a grouping of individuals sharing a mutual interest in a brand, using electronic mediation to overcome real-life space and time limitations (Kozinets *et al.*, 2010). Although brand communities arise from the strong emotional relationships that individuals have with brands, these bonds seem to be fostered and enhanced in community settings (Sheth, 2017; Bagozzi and Dholakia, 2006). Community membership and identification contribute to higher levels of individual consumer intentions and behaviours towards the brand (Dholakia *et al.*, 2004), supported by a collection of internal value-laden engaging practices (Hollebeek *et al.*, 2016). Ultimately, online brand community participation and consumer engagement are two congruent phenomena. Highly engaged online brand community members exhibit all the three key community markers (namely, shared consciousness, shared rituals and traditions and a sense of moral responsibility, Brodie *et al.*, 2011), which are also in line with the community characteristics of offline community members (as proposed by Muniz and O'Guinn, 2001).

Because of these, brand communities can enhance the effectiveness of CRM and loyalty programmes, because they can instil significant and multidimensional (cognitive, affective and behavioural) customer engagement (Dessart *et al.*, 2015; Rosenbaum *et al.*, 2005; Kozinets *et al.*, 2010). Indeed, recent findings (Dessart *et al.*, 2015) have shown that online brand communities enhance the customers' engagement with the brand in all three levels:

- (1) affective engagement (community members enjoy high levels of enthusiasm and enjoyment by interacting online with the brand and the other members);
- (2) behavioural engagement (community members wish to engage with the brand beyond the purchase–transaction relationships such as by providing and sharing information, reviews, ideas, suggestions; by spending time to learn more about the brand; and by spending time and effort to endorse the brand by sharing reviews and comments); and
- (3) cognitive engagement (community members spend more time and show a higher level of concentration and immersion/absorption for learning about the brand and listening to brand communications)

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Hence, communal CRM and loyalty programmes (i.e. practices aiming to build and nurture a brand community) can generate customer loyalty through stronger emotional and social attachment, because they provide the following community benefits (Rosenbaum *et al.*, 2005):

- *Membership esteem benefits*: These make the members feel proud of being part of a group of customers, because they receive special treatment and services by the organisation.
- *Influence value*: This happens when the members feel empowered to influence the group and sense that the group has some influence over them, e.g. give feedback and ideas for new service development.
- *Integration and fulfilment of needs*: These make the members feel rewarded for group participation, because they gain status, self-competency (members receiving knowledge and advice from other members) and self-satisfaction in being able to influence business processes.
- *Shared emotional connection benefits*: These reflect the commitment and belief that members feel when they share history, common places, time together and similar experiences.

Healthy brand communities are rife with dynamic practices that continuously evolve and inspire interactive engagement between the customer and the brand, as well as among brand community members. Customer engagement in community activities is ultimately a vector of value co-creation, from which the firms can reap the benefits in the form of increased brand equity and loyalty (Cova *et al.*, 2007). Thus, community relationship management is proposed as an effective way to implement CRM in a social approach, because it is in line with the co-creation approach of social CRM, and the customer communities can be exploited for connecting and collaborating with the customers for value co-creation and relationships building, because customer communities can instil customer engagement and loyalty. Indeed, many tourism and hospitality firms have created and linked online brand communities with their CRM and loyalty programmes. Two examples are analysed showing how to exploit the communities as an effective way to motivate customer engagement in value co-creation activities (e.g. co-marketing, co-distribution and/or co-production of personalised experiences) and the social media affordances for mobilising the social CRM capabilities (i.e. customer insight/relational information resources, communication and engagement management) and implementing social CRM.

Wyndham operates an online community focussing on the business women ([www.womenontheirway.com](http://www.womenontheirway.com)) to provide specialised customer service and support to this market segment and to collect customer intelligence available in customers' interactions and dialogues for improving and personalising services; enable its loyal members to personalise their experiences, hotel stay and room amenities by linking their community membership with the "By Request" loyalty programme of the hotel chain; empower the members to engage in value co-creation processes (e.g. by helping and networking with each other, sharing experiences and information); and increase customer engagement and loyalty to the community and the firm.

KLM operates four online brand communities, each one targeting and serving the needs of a different market segment (i.e. a running, golf, Africa and China travellers' community, [www.klm.com/travel/gb\\_en/flying\\_blue/about-flyingblue/clubs/index.htm](http://www.klm.com/travel/gb_en/flying_blue/about-flyingblue/clubs/index.htm)). The online communities are linked with the airline's frequent flyer loyalty programme to motivate and reward loyal customers for their community engagement. For example, members of the golf

community are entitled to cargo their golf equipment for free when they fly with KLM, while the members of the running club get registration discounts for running competitions when they fly with KLM for going to the running destination. Community participation is designed to provide various member benefits, such as (Table III) provision of expert advice from professional runners or golfers; networking and travelling with other community members for exchanging information and sharing experiences (e.g. liaise and travel with others who also travel to China and Africa to learn how to set up a business there); and intrinsic benefits generated to members, because they are empowered to create, influence and belong in a social and professional peer network. By providing all types of community benefits (Rosenbaum *et al.* 2005), the communities help in increasing members' bonding, engagement and loyalty with the firm. To enable the members to share and discuss their travel experiences and stories, a Facebook group page is designed for each online community. When travellers log into these Facebook groups, the application collects customer insights (such as, Facebook user profile information and Facebook activity data) that the airline uses for enriching its customer database and the customers' activity in the Facebook group page generates content (earned media) that is automatically posted in the Facebook timeline of the customers' friends (i.e. the customers become co-distributors of marketing content to their Facebook friends' network).

Finally, although the development of online brand communities is a mushrooming phenomenon, there is still limited research investigating how firms can integrate these communities into their CRM strategies and manage these communities for building customer bonds and loyalty. As many brand communities are developed, owned, controlled and self-managed by customers' themselves, research should also examine the role and the ways in which firms can influence and manage these customer-created and owned brand

Member benefits	Type of benefits
<i>Flying Blue Golf community</i>	
Access to an extensive network of golf players worldwide Tips & tricks from the professionals	Influence value Integration and fulfilment of needs
Access to in-depth information about golf courses at your destination Exclusive Flying Blue Golf travel packages Discounts on green fees When you book your tee times online, select courses will supply you with a complimentary 'Flying Blue Golf Bag' for use during your stay Take your golf bag for free on board selected AIR FRANCE and KLM flights Facebook page of the community	Membership esteem benefits      Shared emotional connection benefits
<i>Flying Blue Running Community</i>	
Explore the best running routes at your travel destinations Tips & tricks from the professionals	Influence value Integration and fulfilment of needs
Access to an extensive network of runners worldwide Ask our trainer for advice Exclusive Flying Blue Running event packages Use your Flying Blue Miles for entry to the best running events Receive a discount on flights to specific international running events Facebook page of the community	Membership esteem benefits      Shared emotional connection benefits

**Table III.**  
Community benefits  
of two KLM brand  
communities

communities for their own interests. Online brand communities also seem to offer an effective way to avoid the pointification of CRM and loyalty programmes, as they can nurture social, structural and emotional bonds with the customers. However, the impact of brand communities on customer loyalty and behaviours has not been examined yet. Research should also investigate whether the brand communities create loyalty to the community and its members or loyalty to the firm/brand and how the firms can address this potential issue.

#### 4. Implementing social customer relationship management: a process framework

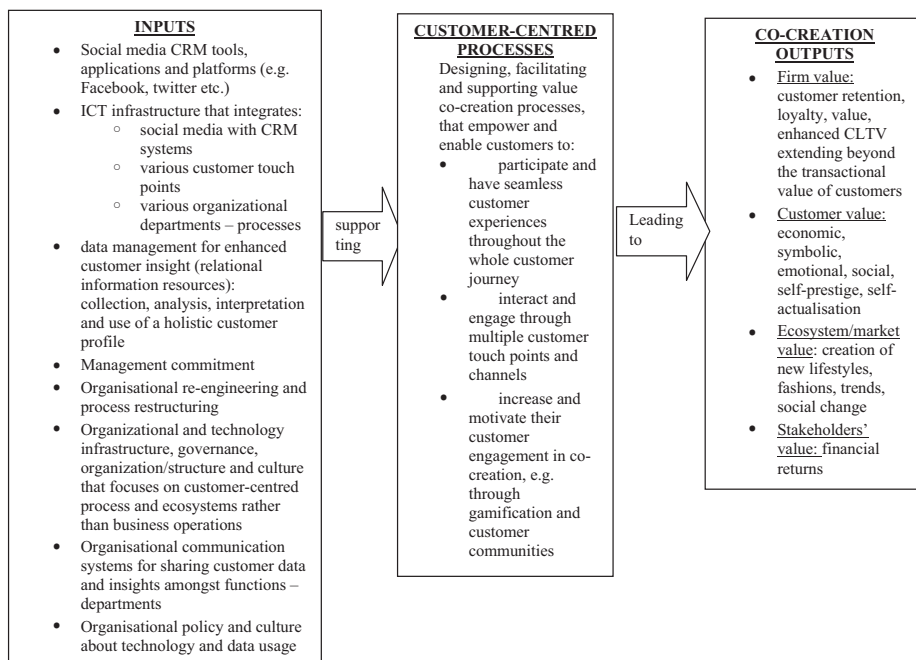
The paper reviewed a wide literature and industry examples for providing a theoretical underpinning and industry evidence to the concept and implementation of social CRM. Five approaches for implementing social CRM were identified, and their appropriateness is justified based on their alignment with the co-creation conceptualisation and tenets of social CRM and their affordances to exploit the social CRM resources and capabilities for increasing customer engagement in value co-creation. All the approaches aim to steward (and not to manage) two-way, interactive customer relations and interactions that can in turn support and motivate customer engagement in value co-creation. The five approaches are definitely not mutually exclusive (as many firms combine their implementation) and certainly, not exhausting, as technological advances provide new affordances and business possibilities and foster significant market changes. Overall, the five approaches provide the following practical implications.

Although the implementation of social CRM is supported, driven by and dynamically evolving with technology, social CRM should not be regarded as a technology solution and/or as a simple technology expanding existing CRM concepts (Trainor *et al.*, 2014). On the contrary, all the approaches demonstrate that social CRM requires the adoption and nurture of a totally different management mindset, organisational culture and philosophy that redefines the CRM paradigm through the lenses of value co-creation, customer engagement and dialogue facilitation, and it transfers content creation, distribution and decision-making to the customers. Social CRM addresses the challenges related to customer empowerment and fuelled by the social media. Furthermore, all the approaches clearly show that social CRM implementation is also empowered by Big Data, enabling firms to (Wieneke and Lehrer, 2016; Marolt *et al.*, 2015) develop a more holistic and rich customer profile and database; unravel the reasons of customer actions and behaviour and understand the factors evolving the former; and take informed marketing decisions and immediate actions for addressing customer issues in real time by collecting and analysing online data. Exploitation of Big Data is widely recognised as the next step for service innovation, and it requires firms to develop their staff's analytical, interpretive and business intelligence skills. As it is difficult to find and develop all these skills in one person, firms would also need to develop the technical-analytical skills of their managers and develop the business skills of their technology experts so that they can communicate in the language of business.

Overall, the five approaches provide evidence that social CRM is a unique combination of emerging technological advances, customer-centric management systems, technology infrastructure and organisational culture that can lead to strong customer relations, satisfaction, loyalty and retention (Trainor, 2012; Trainor *et al.*, 2014; Marolt *et al.*, 2015). To that end, implementing social CRM requires not only technological investments, functionality and integrated information systems but also an organisational culture and transformation that recognises the power and the active role of the customer in value co-creation and an organisational structure and governance that facilitates the analysis,

interpretation, cross-departmental sharing and use of enhanced data of customer insight for developing and supporting personalised customer experiences and interactions.

These arguments are consolidated into a process-based framework, which organises issues related to social CRM implementation into inputs, processes and outputs (Figure 1). The inputs represent the major types of social CRM resources and capabilities that are necessary for supporting value co-creation processes (Küpper *et al.*, 2015a, b,c; Wieneke and Lehrer, 2016). The implementation of social CRM should support the development of customer-centred (instead of operations-centred) value co-creation processes (Trainor *et al.*, 2014; Sisko and Lipiäinen, 2015) to enable customer engagement in co-creating personalised experiences; interacting and engaging through various channels and customer-touch points; and seamless personalised services and customer experiences during the whole customer journey. Social CRM implementation can be enriched through gamification and customer communities for instilling and motivating customer engagement (Sigala, 2015b). As value co-creation processes should provide mutually beneficial relations and interactions to all actors (Grönroos and Gummerus, 2014; Gummesson, 2017), social CRM should produce outcomes to all its stakeholders (customers, firms, the market ecosystem and the firm ecosystem). However, as the framework is built on theory, industry findings need to validate the comprehensiveness of the framework in terms of its components, their interpretation and their interrelations; the impact of its components on social CRM performance; and the business bottom line. Studies should also investigate the various contextual factors (such as customers' personality, profiles and needs, privacy, ethical and legal issues, cultural and social values and other market factors) that may influence the former relations.



**Figure 1.**  
Process-based  
framework for  
implementing social  
CRM



## 5. Conclusions, practical and research implications

Technological advances and changes in consumer behaviour require the firms to transform their CRM conceptualisation and implementation by adding social dimensions and co-creation processes. This evolution of CRM is widely referred to as social CRM; however, research into this field is fragmented and anecdotal (Sheth, 2017; Küpper *et al.*, 2015a). This paper reviewed the related literature and the few emerging industry examples for providing a better understanding and theoretical underpinning of the concept, principles and implementation of social CRM.

Regarding the conceptualisation of social CRM, the social media merge with CRM is found to lead to a new CRM strategic thinking that moves away from the traditional one-sided, product- or firm-centric transactional thinking and incorporates a more collaborative, customer-focussed and ecosystem approach to managing customer relationships. The collaborative activities afforded by social CRM technologies move customer relationships towards a process of engaging rather than managing people (Greenberg, 2010) for co-creating value within the customer's ecosystem whereby all the stakeholders are viewed as value creators (Sheth, 2017; Sisko and Lipiäinen, 2015). Social CRM adopts a value co-creation approach whereby the customer and the customer communities are viewed as co-creators of value and relations. Firms need to divert from relationship management to relationship stewardship by managing customers' ecosystem and affording value co-creation opportunities.

However, although the literature debates the need, scope and tenets of social CRM, there is limited discussion and practical guidance on how the industry can implement social CRM. By reviewing the limited but emerging literature, five approaches for implementing social CRM were analysed. All the approaches demonstrate how the firms can develop a social CRM strategy that empowers and motivates the customers and their communities to participate in value co-creation and relationship development. To achieve that, a social CRM strategy should aim to enable and support various interactions (customer-to-business, B2C, C2C) and personalised customer experiences to take place through various devices, platforms and communication channels throughout the whole customer journey. Practically, this means that firms have to revisit their technology governance and structure (building technological and organisational integration for allowing cross-functional collaboration and embeddedness of external Big Data in decision-making and operations); data analytics capabilities; and organisational policy and rules about technology and data usage (ethics and privacy).

However, customer participation does not always lead to value co-creation (Sigala, 2017). Instead, customers may intentionally or unintentionally, individually or collaboratively (e.g. through communities) contribute to value co-destruction (e.g. spread negative WOM and upload and share false information not because they are loyal to the brand but for getting loyalty points). Hence, as a value co-creation approach makes an implicit but false assumption that all customer engagement can positively lead to value creation, research in social CRM should also investigate the customers' drivers and motivations in engaging in value co-destruction; how customers/communities may contribute to value co-destruction; and how firms can effectively address this phenomenon.

The five approaches also stress on an implementation of social CRM that uses ICT applications to enable and enrich customer interactions that do not only aim to sell but also expand customer and communities' engagement in value co-creation. For example, ICT applications enabling the customers to co-create and co-distribute UGC are primarily designed to communicate with, entertain, inform and educate the customers about the product and the company, which ultimately also results in commercial results such as

increased product awareness, recognition and sales. Moreover, all the approaches highlight that firms have to exploit the information tracking and analytical capabilities of ICT to obtain a better customer insight, enhance their decision-making and develop personalised customer experiences. To mobilise their relational information resources (Marolt *et al.*, 2015) and effectively implement social CRM, firms need to develop the analytical, interpretive and business competencies of their staff, as well as motivate the injection and the use of Big Data into various business processes, such as sales, promotion, service innovation and customer service and engagement.

Finally, every approach emphasises that the implementation of social CRM requires the development of both technological and organisational competencies. Hence, research and practice should adopt a socio-material and multi-disciplinary approach for studying social CRM. Overlooked areas that need to be incorporated and examined in social CRM research include organisational culture, process re-engineering and organisational restructuring, organisational governance mechanisms (e.g. cross-functional teams, communication and coordination), staff skills' development and upgrading, customer management strategies, value co-creation, technology culture and ethics.

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### Corresponding author

Marianna Sigala can be contacted at: [marianna.sigala@unisa.edu.au](mailto:marianna.sigala@unisa.edu.au)

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