Librarians Learning from the Retail Sector: Reaching Out to Online Learners Using Customer Relationship Management

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Abstract:
This article draws on existing literature to examine the case for libraries to adopt Customer Relationship Management (CRM), in order to remain competitive and to meet the needs of users, especially the growing numbers of online learners. It identifies the main challenges being faced by libraries as the information-seeking environment evolves, examines the potential role of CRM in addressing these challenges, and explores the barriers as well as the opportunities that must be addressed by libraries to help ensure the success of CRM initiatives.

Keywords: Customer Relationship Management; Libraries; Online Learners; Information Seeking; Marketing; Massive Open Online Courses.
Introduction: The Changing Environment for Information Seeking

The massive growth in use of the Internet in recent decades has transformed the nature of information seeking and had a major impact on the delivery of many types of services, including educational programs. Most organizations including libraries now have webpages and many universities have moved entire academic programs online. Some high-prestige universities and other institutions are even offering free access to Massive Open Online Courses (MOOCs) on popular topics taught by high-profile faculty, in which thousands of students can be enrolled at any one time (Educause Executive Briefing, 2012). More and more students are studying online and institutional support for these online users, such as library services, is essential. In other sectors such as retail and banking, individuals are becoming used to personalized services, which reflect a Customer Relationship Management (CRM) approach. The increasing adoption of this approach has been transforming the ways that retail businesses and other organizations interact with clients and customers and deliver services targeted to their specific needs. Libraries have been slower to adopt this trend. Although some are adapting to the new information environment by introducing webpages and digital products, studies from around the world indicate that, in general, the library sector is struggling to keep up with the changes in the information-seeking environment and may not survive unless it becomes more innovative and responsive to user needs (Ipsos Mori/Shared Intelligence, 2013; Wang & Dawes, 2012). Since library users increasingly have a wide range of alternative online sources to turn to for information, it is becoming imperative for the sector to offer more personalized services, while building on the unique strengths that other information providers are unable to compete with. Librarians have important skills and expertise which can add value to the searches of online learners and other library users, but these need to be upgraded and expanded to reflect the information-seeking behaviors now prevalent in the online environment, as well the growing expectations for personalized services.

Meeting the Needs of Information Seekers

The Association of College and Research Libraries (ACRL) Division of the American Library Association’s Standards for Distance Learning Library Services highlight the need to meet “growing concern and demand for equitable services for all students in higher education, no matter where the “classroom” may be” (ACRL, 2008, July 1). In this context, libraries face the new challenge of developing and delivering the types of products and services needed by the rapidly growing numbers of online learners. Though these students are often physically remote from the library, they are often literally just a click away from its digital resources via the Internet. Despite this, there is still a need to bring the students to the library resources via the website, or alternatively to take the resources direct to them. A variety of tools are now being used to achieve this: for example, university webpages often have a link to the library on their Internet homepage and many online courses include this in their online classroom. Some libraries place links to carefully selected resources in these online classrooms, or even embed a librarian in the online classroom. These interact with online learners in a variety of ways, for example creating and monitoring a discussion board for library related questions, or creating library use tutorials that are class and content specific. These strategies may not be enough to encourage learners to visit the online library. As Shumaker (2009) notes, “when we don’t recognize we need information, or that the librarian could supply it, we don’t go to the library. The question never gets asked” (para.5). If students have not been regular users of physical libraries, they may be unlikely to click the link that takes them to their institution’s virtual library. This reflects the longstanding issue, identified as early as 1993 by Kuhlthau when conducting research into the roles of mediators in the process of information seeking, that students tend to underutilize the services of librarians. Kuhlthau (1993) defined an information mediator as “a person who assists, guides, enables, and otherwise intervenes in another person’s information search process” (p. 128), and distinguished between formal mediators, such as librarians or teachers, and informal mediators such as relatives, friends or colleagues. Her research revealed that, among users in all types of libraries (academic, school, or public), librarians were most often considered as a last resort source locator, someone to help with obscure sources, or used when needing a quick and easy solution. Kuhlthau (1993) reported that her research participants “expected (or were expected) to proceed totally on their own without assistance from formal mediators” (p. 130) and that when they wanted help with ideas for topics they mainly used informal mediators such as parents, siblings, and friends. The study did find, however, that students welcomed the pos-
sibility of a more expanded role for formal mediators in their search process, described by one in terms of “intervention to address what you have found, any problems you may have, and the point you are at in the process” (p. 133).

In today’s information-seeking environment, traditional libraries face fierce competition for the attention of online learners and other information seekers, and librarians may be even less likely to figure in their information-seeking strategies. The types of products and services traditionally provided in physical libraries are now increasingly available online from commercial and other sources (Zimmer, 2013), and librarians are more likely to use sources such as Google and Wikipedia as their first port of call when searching for information online, largely for reasons of convenience and low cost (Maceviciute, 2014). The developments in information seeking also reflect demographic changes: the generation often referred to as digital natives, Millennials or Generation Z, consisting of those born after around 1980, have grown up with digital technologies and are more naturally inclined to use web-based search engines for their information needs (Nutefall & Chadwell, 2012; Zimerman, 2012). They are also natural networkers, and will interact easily with others online within their own networks or in community forums to obtain the information they require (Coates, 2010; Zimerman, 2012).

As a result, the role of formal mediators such as librarians is strongly under threat from the extensive range of informal mediators that information seekers now have ready access to online, while the very survival of libraries is also threatened from the wide range of competitors providing references services and digital information products.

Faced with these challenges, there is a need for libraries to become more competitive and to adopt business-like approaches to innovation, marketing and building relationships with users. This change is long overdue: in 1997 library management expert Herbert White observed that libraries have traditionally never marketed their products and services, and argued for the importance of adopting active marketing strategies. More recently, studies of library users have revealed that although many libraries now offer access to a wide range of digital products and resources, users are often not aware of the diversity of offerings available from their library (Garoufallou, Zafeiriou, Siatri, & Balapanidou, 2013). This highlights the problem that, despite efforts by libraries to adapt to the new information environment, significant weaknesses persist in the marketing of these to current and potential users. For example, a nationally representative sample of 2,752 adults living in the United States conducted by the Pew Research Center (Rainie, 2016) found that almost half of all respondents in each case did not know if their library offers online programs for certification in new skills, programs on starting a new business or online GED (General Education Development) or high school equivalency classes, 38% did not know if online career resources were available and 22% were unaware whether e-books or audio books were available for borrowing. Similarly, studies conducted for the Online Computer Library Center found that many people only associate libraries with books and not online resources or reference services, instead preferring to ask personal contacts for information or to use online search engines (Connaway, Dickey, and Radford 2011; Connaway, Lanclos, and Hood 2013).

When doing searches online or using informal contacts, however, learners often face difficulties in being able to identify what is relevant to their needs from an often overwhelming amount of information, and in critically evaluating the credibility and authority of the sources. Additionally, it can be challenging and often confusing trying to use the right Boolean logic to generate relevant results, or working out how to navigate online databases and digital libraries. This is where the unique skills and expertise of librarians can be crucial in assisting online learners and other users in their information searches. Since many users remain unlikely to search out the services of librarians, however, there is a need for a major shift towards more proactive approaches on the part of libraries to engage with these users, identify their needs and provide the types of services that will add value to their information searching (Garoufallou et al., 2013; Tiffin & England, 2011). In this respect, librarians can learn a lot from the personalized approaches to marketing now being used across the retail sector, including bookstores, known as Customer Relationship Management (CRM). This approach can serve as a useful framework for the delivery of more personalized and customized services which effectively take the library to its online users rather than waiting for them to come to the library.

What is Customer Relationship Management?
The concept of Customer (or Consumer) Relationship Management (CRM) first emerged in the business world in the 1960s, as the focus of marketing shifted
from short-term promotion of goods and services to an emphasis on increasing the profitability of individual customers over the lifetime of their relationship with a firm (Wang, 2007). Although there is no formal definition of CRM, and the literature contains many different descriptions of the concept (Harker, 1999), the following is a useful and comprehensive definition put forward by Bennett (1996):

“Consumer RM seeks to establish long-term, committed, trusting and co-operative relationships with customers, characterized by openness, genuine concern for the delivery of high-quality goods and services, responsiveness to customer suggestions, fair dealing, and (crucially) the willingness to sacrifice short-term advantage for long-term gain” (p. 418).

An important aspect of CRM is that it is largely data-driven, which in the library sector means it relies on the collection and use of data on the characteristics of learners and their online search activities in order to develop personalized recommendations or search results tailored to their specific needs. This is facilitated by the use of digital technologies, which allow for the capture and automated analysis of relevant data and the generation of personalized outcomes (such as search results or book recommendations). These can then be communicated electronically to the service user, in ways similar to the practices of online bookstores or commercial information providers (Hurst, 2013).

The CRM also crucially involves the provision of personalized, one-to-one support services, in which librarians for example will assist users in navigating online databases and search engines, using search terms correctly and evaluating the quality of sources. In the case of online learners in particular, these personalized services cannot just rely on users requesting help, since the research evidence indicates that such users do not turn to librarians in this way and are often unaware of the types of support and assistance that new types of libraries can provide (Maceviciute, 2014). Instead, researchers suggest that proactive monitoring of users online and offering the assistance of virtual librarians may be a more effective way of building relationships and generating the type of long term value that will help retain library users and ensure that the libraries deliver the intended value to individuals and institutions alike (Smith, 2012).

Another crucial aspect of CRM is its long-term focus, in which a product or service provider takes the time to really understand the needs of individual customers, and to develop personalized offerings that reflect these needs. Relationship marketing is not just about generating more customers or users, but is focused on retaining them over time: “relationship marketing emphasizes customer retention and long term customer relationships” (Besant & Sharp, 2000, p. 18). The approach is also based on the principle that satisfied customers will recommend the organization to others. This aspect of CRM has become especially important now that use of the Internet and social media have elevated the importance of personal recommendations and reviews over conventional forms of marketing, and given rise to the important marketing concept of “word of mouth” (Stone & Woodcock, 2014). Tiffin and England (2011) emphasize the importance and relevance of this aspect of CRM to libraries, which are not concerned with generating profits but do have a strong interest in retaining existing users over time, and in attracting more users through the positive “buzz” or word of mouth generated by satisfied “customers.”

Care must be taken, though, to not confuse personalization and customization. Customization occurs when services are tailored to a niche group of library users, such as online learners (MacDonald & vanDuinkerken, 2015), but does not require any direct interpersonal contact. The personalization of services goes far beyond this developing “relationships” between libraries and their users, finding out about their individual needs, and tailoring services to these. Empirical research has demonstrated that the use of personalization can significantly improve performance in information searches. An experimental study conducted with users of Monash University Digital Library involved student profiling by incorporating data into the search environment on the units in which students are enrolled. The results showed that the personalized approach significantly outperformed the generic approach to searching, in terms of relevance of search results (Alaofi & Rumantrir, 2015).

The Case for Adopting CRM in the Library Sector

The personalization of services is the driving force behind relationship marketing, and can “intimately influence customer perceptions of service quality” (Mittal & Lassar, 1996, p. 96). According to Mittal and Lassar (1996), “personalization emerges as the most important determinant of perceived service quality, and of customer satisfaction and other patronage indicators” (p. 95).

CRM relies heavily on direct engagement with customers, an aspect which provides it with a range of
important marketing qualities. Tiffin and England (2011) note that the process of direct engagement is “affective and emotional as well as behavioral and cognitive” (p.238), and thus able to generate the type of marketing value referred to in the commercial world as brand loyalty (Tiffin & England, 2011). Based on research in a range of settings including e-learning, personalization of services has been shown to be positively associated with user satisfaction and retention (Meadows & Dibb, 2012; Ferran, Mor, & Minguillón, 2005), generating “relationship capital” which has become one of the most important sources of value in today’s business environment. Town (2015) observes that from a financial perspective, relationship capital represents “quantification of the effect of goodwill as an intangible asset which increases market value” (p.237). This is an especially important consideration for libraries, which do not carry unique goods since students can get their information from many different sources. Librarians can differentiate themselves with personalized and customized services targeted at specific users and user groups along the lines of the “highly successful ‘self-service’ retailers who differentiate themselves not through goods—which others carry also—but through service—which others have difficulty in matching” (Berry, 1986, p. 3). It has become crucial for libraries to develop the ability to build this form of capital in order to compete with commercial providers of information services. Perhaps most importantly, the evidence indicates that all types of customers, including library users, also want these kinds of relationships. For example, Parasuraman, Berry, and Zeithaml (1991) found that customers want to be known by and cared about by service providers and prefer to deal with the same representative in ongoing personalized relationships over time. Research compiled for the Online Computer Library Center by Connoway (2015) confirmed the importance of “developing relationships and engaging with people” both online and in physical libraries, because “if they know us and trust us, they will seek us out when they need information and they will recommend us and our services to others.” (p. ii) Connoway and Radford (2011) found that in virtual reference services, both librarians and users value the relationships developed, although users indicated that they often prefer face to face environments because of the ease of developing relationships with librarians. The importance of customer service in libraries was identified by Richardson (2002), who conducted research with 9,274 individuals seeking assistance from librarians in 12 public libraries. He found that “users often indicated that they were satisfied even when they did not receive a useful response from a librarian” (Richardson, 2002, p. 42). This study found that library users reported greater satisfaction from interactions with librarians who practiced skills from the RUSA Guidelines for Behavioral Performance of Reference and Information Services Professional, which are “really customer service guidelines” (Richardson, 2002, p. 42).

In the case of online users, delivering services in a face to face environment is not possible, making it even more important to implement CRM in order to ensure that these users are aware of and effectively utilize the online services of libraries. Further, reflecting the increasing role of digital and mobile devices in everyday life as well as trends in business marketing, the Ipsos Mori/Shared Intelligence (2013) study of the UK library sector highlighted that individuals expect and demand personalized services round the clock, and are also faced with information overload and problems of determining the integrity of data, reinforcing the need for libraries to adopt CRM and provide online services targeted to user needs. The need for libraries to provide more personalized services, however, was recognized long before use of the Internet and mobile devices became so widespread: “Libraries need relationship marketing” stated the title of an article by Besant and Sharp, published in 2000, and intended to introduce relationship marketing to the library world. These researchers questioned whether there could be a “more straightforward way to create a vigorous library of value to users than by understanding and cultivating relationships with users” (p. 20). Yet in 2007 Wang observed that “very few libraries have employed sophisticated CRM information systems” and the situation appears to have changed little since then. Despite this lack of progress, libraries are well placed to differentiate themselves in today’s information seeking environment, using CRM to build on their unique strengths. As Connoway and Radford (2011) observe, these strengths include having a strong community or institutional-based physical presence, especially in the case of academic libraries, which facilitates their ability to develop and maintain relationships both in person and online and to provide the kind of one-to-one, specialized support that just isn’t available from Google, Amazon or other online information or reference sources. In this context, it is the librarians themselves that are the unique selling point
of libraries (Connnoway, 2015), and whose role therefore needs to be updated and modified to ensure this remains focused on the needs of today’s library users, especially online learners.

CRM and Online Learners

The Internet provides innovative librarians, like direct marketers, with an ideal vehicle to develop one-to-one relationships with online learners. Librarians have an advantage over commercial marketers in this area, however: Geller (1998) observed that it is not always easy for marketers to reach Internet buyers because it is “not like print or television advertising where you bring your ad to consumers” (pp. 37-38). In contrast, the Internet provides academic and other librarians direct access to a growing segment of their users, the “captive audience” of students in online classes. In common with other organizations, librarians can now benefit from “unlimited access to customer profiles” (Geller, 1998, p. 36) in the form of the data readily available online about online learners and their search activities. Geller (1998) considers the Internet to be the ultimate relationship-marketing tool, providing marketers with the opportunity to understand the needs of their customers and by giving them the ability to build personal relationships (p. 36).

This also provides the library sector with the opportunity to realize at least in part the 2008 forecast of Seiss, who envisioned a future “without libraries...but with more librarians” (p. 39). She introduced the idea of a future without physical libraries but with these professionally trained librarians embedded within units of the organization and “degreed, not only in librarianship with an emphasis on customer service, but also in the subject matter of the users” (p. 39).

This built on Schumaker and Tyler’s (2007) concept of embedded librarianship in which three models were identified: physical embedding by actually locating the librarian’s office in the same location as the offices of the customer group, customer group funding and supervision of the librarian, and delivering the library services virtually in an online workspace used only by the customer group. For the rapidly growing population of online learners, embedding library services in online classrooms and adopting CRM strategies to develop personalized services, appears to be the best way not only of attracting the attention of these learners, but ensuring that their unique needs and preferences are understood. This is especially important now that online learning is enabling a diverse range of people to participate in education who might otherwise have been unable to do so due to cost, time, location or academic eligibility constraints. These online learners may have different characteristics and needs from conventional students and libraries have relatively little experience of understanding and meeting the needs of this group. Librarians who become embedded in online classes have the proximity necessary to identify the needs of their students and to “respond to them as quickly and efficiently as possible” (Geller, 1998, p. 36). In order to take advantage of the close proximity, however, librarians must be extremely proactive in offering assistance, for example through the use of pop up chat boxes offering assistance when users begin an information search. With the feeling of remoteness or disconnectedness that is so easy to feel in an online class, especially from other university services such as the library, the attempts of a librarian to connect with the students and assist in the information search, can provide just the personalization that Mittal and Lassar (1996) describe as “the most important determinant of perceived service quality, and of customer satisfaction.”

The types of reasons why this form of personalization is likely to be valued by online users can be understood using the analogy of a personal shopper. Genin (2001) points out that the “personalization of shopping services and their quality ‘has long been recognized as an important strategic retailing weapon, particularly in developing defensive marketing strategies.’” (Fisk, Brown, & Bittner, 1993)” Genin (2001) found that the most commonly cited reasons why consumers prefer the personalized service of a personal shopper include lack of time to shop, convenience, lack of knowledge of what is available, and a desire for professional judgment, moral support or another person’s opinion. The available evidence suggests that people are likely to seek the assistance of a librarian or other information professional for similar reasons. For example, Connnoway, Dickey & Radford (2011) found that convenience was the most important criteria considered by individuals when selecting an information service or system. Embedding librarians in online classes, thus giving them the close proximity to recognize student information needs and serving as the personal shopper of the information world by proactively providing personalized services might just be the path to offering superior customer service to online students. A parallel has also been made in the literature between personalized library services and the concept of “helicopter parents,” a term developed to describe overprotective parents who watch over their children and...
get involved in their lives whenever they perceive help is need. Negative connotations in the parent-
ing context aside, Smith (2012) discusses the idea of “helicopter librarianship” as “a holistic approach to a human interaction based on individuality and genuine compassion,” and a valuable way of building relationship capital with online library users. This involves for example, virtual librarians offering their services to users in navigating online catalogues and databases and helping to locate their required information.

New Challenges and Opportunities for Libraries

Although CRM undoubtedly offers significant poten-
tial benefits for online users and libraries alike, its adoption by the library sector is not straightforward but requires a transformational approach. This necessarily includes the development of new skills and mindsets in the library sector and the redefinition of the roles of librarians. In particular, librarians need new skills and mindsets to enable them to monitor user activity online and to be proactive in offering assistance, instead of waiting for the user to request help as in the conventional library situation. In a paper on future plans for the use of personalized services at the University of Technology Sydney Library (Booth, McDonald & Tiffin, 2010), it was emphasized that the success of the plans depended on the willingness of staff to provide such services and to be more open than ever before about their own professional personas, so that one to one relationships with users could develop. Changes are also needed in management styles and organizational structures (MacDonald & van Duinkerken, 2015), as well as the willingness to devote the necessary time and resources to the design of CRM systems, including data capture storage, analysis methods and customer service processes and tools (Wang, 2007). Dempsey (2015) sums up the changes that libraries must embrace in terms of a shift from the traditional approach of thinking about users in the context of the library to a new focus on consider-
ing the role of the “library in the life of a user.” This is a high-stakes exercise - even in other sectors there are high rates of CRM failure for reasons including inflexible corporate cultures and organizational structures, inadequate technology, poor understanding of customer needs and a lack of suitable staff training (Meadows & Dibb, 2012).

In any case, the literature indicates that most libraries have a long way to go in their adaptation to the new information environment and the needs of online learners; the evidence indicates that many are strug-
gling to develop the new skills necessary to deal with digital technology, online learning and marketing, and that this is exacerbated by a lack of adequate communication and knowledge sharing within the library sector (Bell & Shank, 2009; Ipsos Mori/Shared Intelli-
gence, 2013). The cultural changes necessary for CRM may be the biggest hurdle for libraries to overcome, as illustrated in a case study of an attempt to intro-
duce this approach into an academic library in Taiwan (Wang, 2007). The study revealed high levels of staff resistance to the idea of CRM, based largely on the view that students and university staff were a captive audience while at the university and that there was no need to retain them as library users in the longer-term, and a lack of agreement with the need to differentiate users by personal needs and prefer-
ences. The library staff also expressed concerns about possible increases in their workloads if CRM were introduced, and about the investment of time and cost required for developing and promoting the CRM sys-
tem. Overall, the researchers concluded that the biggest barriers to introducing CRM are the lack of internal awareness of the need for this approach, and how to engage and empower staff in its development and implementation so that they buy into the concept. There is a clear need for effective and strong leader-
ship to champion and implement CRM, both in the sector as a whole and in individual libraries. In par-
ticular, for CRM to succeed, both in academic libraries and in the sector more generally, leaders must demon-
strate what Le (2015) identified as the top five most important academic library leadership attributes: vi-
sion, integrity, management skills, collaboration skills and communication skills. Based on a survey of indi-
viduals who hold senior library leadership positions in American academic libraries throughout the USA, Le (2015) also found that the top five major challenges facing the sector, as perceived by these leaders consist of demonstrating the value of the library to the university community, dealing with fiscal uncertainty, updating outdated library facilities and providing new services, getting the right balance between digital and print materials, and upgrading staff skills. Faced with such a wide range of challenges, it is not hard to see why CRM has not received a high level of attention by libraries to date, yet it is an approach which might be instrumental in ensuring that the already over-
stretched resources of libraries, as well as their com-
petitive strengths, are utilized in ways that generate the greatest value for users.

One of the main dilemmas facing libraries, however,
which must be addressed before CRM can be wholeheartedly embraced, relates to the issue of user privacy. As highlighted earlier, a distinguishing feature of CRM is that it requires collection of detail data on the characteristics and search activities of users in order to provide services tailored to their needs. Culturally, this may be a big hurdle for library staff to accept, since as Zimmer (2013) observes, it clashes with traditional ethics of the sector in which protection of user privacy and intellectual freedom have always been of the highest priority. Indeed, these types of values are enshrined in documents such as the ALA’s Library Bill of Rights and its Privacy Policy (Zimmer, 2013), and have been adhered to through the use of anonymous browsing, non-monitoring of user activities and short-term data retention policies. Arguably the majority of people nowadays, especially those in younger generations, will have little difficulty accepting the change, since the advent of Web 2.0 and Web 3.0 technologies has already brought about routine tracking of online behaviors by the major search engines as well as online retailers and other organizations. Moreover, the extensive use of social media as well as mobile devices is leading to changes in user expectations of libraries, as reflected in an increasing demand for round the clock online availability of services and assistance (Booth et al., 2010). Noh (2014) observes that many libraries are already collecting personal information about users, for identification purposes when using the online library network and to use in aggregated form to provide statistical data to vendors for pricing purposes. Many libraries are also using email to communicate with users about return dates for borrowed books and to communicate information expected to be of interest to patrons (Noh, 2014). Most libraries have websites through which users can often search catalogues and databases and manage their own borrower account, and some of the more advanced are active on social media, with Facebook, Twitter or YouTube sites for example being used to interact with users (Farkas, 2007; Maceviciute, 2014). In fact, Boateng & Yan (2014) report that all top US academic libraries have a presence on Facebook and Twitter. Indeed, the term Library 2.0 was coined by Casey and Savastinuk (2006) to describe the ways in which innovative libraries are introducing “interactive, collaborative and user-centered web-based technologies to library services and collections” (cited in Zimmer, 2013, p.30) which include providing real-time virtual assistance from library staff via instant messaging platforms; the use of online forums which facilitate interaction between users, and the use of personalized recommendations based on borrowing or search history (Zimmer, 2013). Instead of the one-way communication typical of traditional library services, users generate much of the online content relating to library products and services, often in interaction with others. In Library 2.0, the library becomes a user-centric community in which the content is driven by actual learner needs rather than what librarians believe these needs to be, and in which users are not only assisted by librarians but by other learners (Deodato, 2014). Though Library 2.0 may not yet have been wholeheartedly embraced by the sector, the fledgling developments in this area do provide a foundation for the adoption of CRM, if only in relation to the cultural and mindset shifts that will be necessary for the success of this approach.

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