

CRM

Customer Relationship Management

Mestrado em Marketing

Aula 5

Paulo Almeida Gonçalves (pagoncalves@iseg.ulisboa.pt)

Cristiane Drebes Pedron (cdpedron@iseg.ulisboa.pt)



LISBON
SCHOOL OF
ECONOMICS &
MANAGEMENT
UNIVERSIDADE DE LISBOA



Cronograma

Aula	Dia	Agenda	Artigo	Caso
1	19 Fev	Conceitos introdutórios.		1
2	26 Fev	Estratégia. Valor. Integração multicanal. Fidelização.	1	2
3	5 Mar	Gestão de informação. Tecnologias.	2	3
4	12 Mar	Tecnologias. Implementação. ERP.	3	4
5	19 Mar	Web 2.0. CRM Social.	4	5
6	9 Abr	Apresentação de software.		
7	16 Abr	Apresentação de software.		
8	23 Abr	Apresentação de software.	5	6
9	30 Abr	Customer Experience. Mobile. Analytics. Big Data.	6	7
10	7 Mai	CRM para PMEs.	7	
11	14 Mai	Apresentação de trabalhos.	8	
12	21 Mai	Apresentação de trabalhos.		

Artigos acadêmicos

#	Artigo
1	Chen, I. J., & Popovich, K. (2003). Understanding customer relationship management (CRM) People, process and technology. <i>Business Process Management Journal</i> , 9(5), 672-688.
2	Frow, P., Payne, A., Wilkinson, I. F., & Young, L. (2011). Customer management and CRM: Addressing the dark side. <i>Journal of Services Marketing</i> , 25(2), 79-89.
3	Nguyen, B., & Mutum, D. S. (2012). A review of customer relationship management: successes, advances, pitfalls and futures. <i>Business Process Management Journal</i> , 18(3), 400-419.
4	Shokohyar, S., Tavallaee, R., & Karamatnia, K. (2016). Identifying Effective Indicators in the Assessment of Organizational Readiness for Accepting Social CRM. <i>International Journal of Management, Accounting and Economics</i> , 3(2), 85 -104.
5	Orenga-Roglá, S., & Chalmeta, R. (2016). Social customer relationship management: Taking advantage of Web 2.0 and Big Data technologies. <i>SpringerPlus</i> , 5(1), 1462.
6	Paliouras, K., & Siakas, K. V. (2017). Social Customer Relationship Management: A Case Study. <i>International Journal of Entrepreneurial Knowledge</i> , 5(1), 20-34.
7	Valacherry, A. K., & Pakkeerappa, P. (2018). Customer Knowledge Management via Social Media: A Case Study of an Indian Retailer. <i>Journal of Human Values</i> , 24(1), 39-55.
8	Clark, M., & Melancon, J. (2013). The influence of social media investment on relational outcomes: A relationship marketing perspective. <i>International Journal of Marketing Studies</i> , 5(4), 132.

Agenda

- **Web 2.0**
 - Web 2.0
 - Social Computing
 - Social Network Sites
 - Social Media
- CRM Social
 - Características
 - Principios
 - Cliente social
 - Ejemplos

Sítio Web 2.0

- **Utilizadores como entidades de primeira classe** no sistema, com páginas de perfil de destaque, incluindo características tais como: idade, sexo, localização, depoimentos ou comentários sobre o utilizador por outros utilizadores;
- **Capacidade de formar conexões entre os utilizadores**, através de links para outros utilizadores que são "amigos", participação em "grupos" de vários tipos, e assinaturas ou alimentações RSS de "actualizações" de outros utilizadores;
- **Capacidade de postar conteúdo de vários tipos**: fotos, vídeos, blogs, comentários e avaliações sobre conteúdo de outros, marcação (tag) do conteúdo do próprio ou de outros utilizadores, e funcionalidades para controlar a privacidade e a partilha.

(Cormode & Krishnamurthy, 2008)

- Web 2.0 é a rede como plataforma, abrangendo todos os dispositivos conectados;
- Consumo e “remix” de dados de várias fontes;
- Criação de efeitos de rede através de uma "arquitetura de participação“.

(O'Reilly, 2005)

Social Computing

Concepção e utilização das TIC, que consideram o contexto social (Wang et al., 2007)

- Estrutura bottom-up
- Controlo de acesso mínimo e participação de diversos utilizadores
- Ausência de estruturas de governança fortes
- Dinâmico com refinamento contínuo dos conteúdos e da actividade online
- A qualidade depende da contribuição dos utilizadores
- Os utilizadores avaliam a contribuição dos outros utilizadores e o histórico das avaliações (ratings) determinam a reputação
- Estrutura livre e flexível: os utilizadores determinam a estrutura e ela evolui continuamente
- A interacção social transforma o sistema caótico num sistema mais confiável
- Altruísmo e factores motivacionais orientados para a comunidade dominam o comportamento na maioria dos casos

(Parameswaran & Whinston, 2007)

Social Computing

Espaços de informação dinâmicos

- As ferramentas de computação social, e alguns dos aplicativos e ferramentas da Web 2.0 permitem que o utilizador crie um **espaço de informação** em torno dele, incluindo toda uma variedade de **conteúdo** utilizados e criados, bem como **aplicativos**
- O espaço de informação é **continuamente refinado** por interações sociais
- Cada espaço de informação pode **impactar** o espaço dos outros utilizadores
- O espaço de informação é portátil, não reside num dispositivo. **Reside na rede**, e é activado por identidades portáteis, a partir de dispositivos portáteis, através de uma ampla variedade de ambientes – casa, trabalho, pontos de acesso
- Estes espaços representam repositórios de informações de preferência, de padrões de consumo, de tendências sociais, de informação de segmentação de mercado e de oportunidades para personalização de granularidade muito fina, incluindo localização, comunidade e nível individual

Social Network Sites

Definição

Serviços web-based que permitem aos indivíduos:

- (1) construir um perfil público ou semi-público dentro de um sistema limitado
- (2) articular uma lista de outros utilizadores com quem eles compartilham uma conexão
- (3) ver e percorrer a sua lista de conexões e a das outras pessoas, dentro do sistema

A natureza e nomenclatura destas conexões varia de acordo com o sítio usado.

Foco

- O que torna os sítios de rede sociais únicos é que eles permitam que os utilizadores **articulem e tornem visíveis suas redes sociais;**
- A comunicação principal é com **pessoas que já fazem parte de sua rede social ;**
- Estão organizados à volta das **pessoas** e não dos seus interesses;
- Os sítios de redes sociais estão estruturados como redes pessoais (ou “egocêntricas”), com o **indivíduo no centro da sua própria comunidade.**

(Boyd & Ellison, 2007)

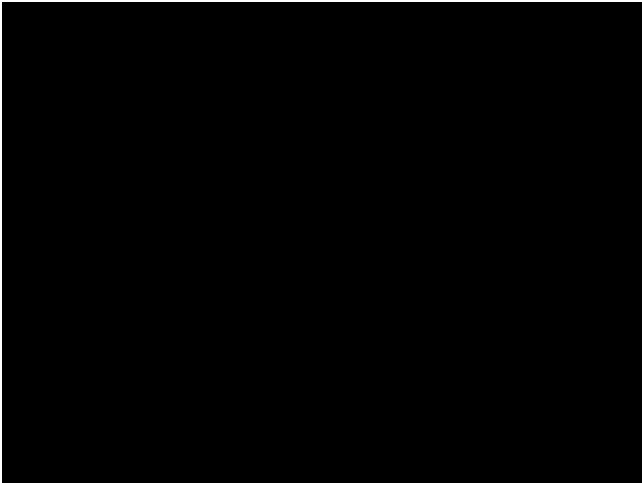
Social Media

- A **group of Internet-based applications** that build on the ideological and technological foundations of Web 2.0, and that allow the creation and exchange of User Generated Content (UGC); (Kaplan and Haenlein, 2010, p.61)
- Is a **term used to describe social interactions using technology** (such as the Internet and cell phones) with any combination of words, pictures, video, or audio; (Smith, 2012, p. 1)

Social Media and SNS

- The terms “social media” and “social networking” are used synonymously, but there is a “slight difference,” that is, the former referring to the **means by which communications are transmitted**, whereas the latter referring to **functional tools for information-sharing**. (Hudson and Roberts, 2012, p. 769)

Social Media Revolution



<https://www.youtube.com/watch?v=2lcpwISzbQ>

Agenda

- Web 2.0
 - Web 2.0
 - Social Computing
 - Online Social Networks/ Social Network Sites
 - Social Media
- **CRM Social**
 - **Características**
 - **Princípios**
 - **Cliente social**
 - **Exemplos**

O caminho para o CRM Social

- CRM no ápice nas adoções
- Uma nova geração, consumidora de Internet, aparece (a chamada Geração Y)
- Web 2.0 altera o paradigma da Internet
 - Blogs
 - Redes sociais
 - Wikis
 - etc.
- Partilha do conhecimento passa a ser considerada como “free and inexpensive”
- O cliente passa a estar no comando do “business ecosystem”.

(Greenberg, 2010)

Quem é o cliente social?

- Acredita nos pares
- Ligado na Internet
- Utiliza dispositivos móveis
- Partilha informação
- Exige transparência e autenticidade
- Tem vontade de estar ligado a algumas empresas (especialmente quando recebe algo em troca)
- O driver central do relacionamento é a confiança
- Geração Y é uma geração pró-ativa

(Greenberg, 2010)

The Social Customer

Being connected, customers realized that they could ask more from companies and share opinions about products and services

Web 2.0 stimulated fundamental changes in consumer behavior

Interactions between customer and brands starting earlier and never ending

New behavior patterns demand a new strategy, better segmentation, new channels and targeted messages and review of current customer facing business processes



Have some degree of trust in the following forms of advertising:

Recommendations from people known	92%
Consumer opinions posted online	70%
Editorial content (e.g. newspaper article)	58%
Branded websites	58%
Emails signed up for	50%
TV	47%
Brand sponsorships	47%
Magazines	47%
Billboards/ outdoor advertising	47%
Newspaper	46%
Radio	42%
Ads before movies	41%
TV program product placements	40%
Ads served in search engine results	40%
Online video ads	36%
Ads on social networks	36%
Online banner ads	33%
Display ads on mobile devices	33%
Text ads on mobile phones	29%



Twitter



Pinterest



Facebook



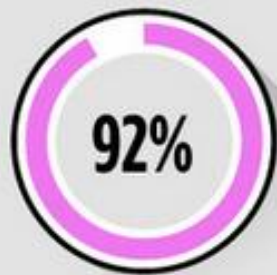
Blogs

BOUGHT MEDIA
Advertising, Sponsorship



Consumers TRUST influencers more than brands.

Branded content comes across as being biased, so consumers go online to find reviews and recommendations from people who are not associated with the brand.



92% of consumers trust recommendations from other people — even someone they don't know — over brand content.



70% of consumers reported online customer reviews as the second most trusted source.



47% of U.S. readers consult blogs for finding new trends and ideas.



35% of U.S. readers look to blogs for discovering new products.



20% of women active on social media are motivated to consider products promoted by bloggers they know.

Social proof

- Consiste em **observar as acções dos outros** como uma pista para a própria acção
- Os decisores imitam os seus pares, especialmente se estes forem percebidos como bem sucedidos, para **minimizar os custos de pesquisa** e para **evitar os custos de experimentação** (DiMaggio e Powell, 1983).

THE STONE ROSES ALBUM ART PRINT FRAMED CANVAS 20"x20"

Condition: --

Quantity: 1

More than 10 available
25 sold

£18.99

Buy it now

Add to basket

Add to Watch list
25 watching

Add to collection

25 sold

Located in United Kingdom

Collect 19 Nectar points
Get Started | Conditions

Seller information
newrock-licence2thrill (31085)
99.9% Positive Feedback

Follow this seller

Visit Shop: Licence To Thrill Ltd
See other items

Registered as a business seller

Littlewoods SHOP NOW

eBay

CRM 2.0 definition

“CRM 2.0 is a philosophy & 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 & transparent business environment. It's the company's response to the customer's ownership of the conversation**”

(Greenberg, 2010, p.413).



<https://www.youtube.com/watch?v=8r45b1dhrqY>

Web 2.0 in the CRM domain

Defining Social CRM

- Two underlying concepts of social CRM - **Web 2.0 and CRM**
- Businesses are becoming more **customer-centric** and see a need to **address customers more individually**
- Social CRM is about creating a **two-way interaction between the customer and the firm**. It is a CRM strategy that uses Web 2.0 services to **encourage active customer engagement and involvement**, which results in mutually beneficial value
- Web 2.0 adds value in every CRM domain – **customer behaviour, customer interaction, marketing, and customer lifetime value**
- The company can **learn** from its customers because they are given more freedom in interaction with the company and other customers
(Faase et al., 2011)
- Social CRM creates a two-way interaction between parties and **gives customers ownership over the conversation with the firm** (Greenberg, 2009; Shimp, 2009)

Características do CRM Social

1. Empresas não controlam a relação, **não é possível a “gestão da relação”**, existe a possibilidade de “facilitar experiências” colaborativas e diálogos (Baird e Parasnis, 2011).
2. Existe **relacionamento entre “cliente-cliente”** (Baird e Parasnis, 2011), clientes querem ouvir conselhos de outros clientes (Stone, 2009).
3. Existe uma **experiência mais rica do cliente** e maior participação e controlo deste (Stone, 2009).
4. Existe uma **criação dinâmica de conteúdo** por parte do utilizador (Stone, 2009).
5. O cliente tem mais liberdade para agregar e fazer **“merging” de conteúdos do seu interesse** de diferentes fontes (Stone, 2009).
6. Clientes têm o poder de **gerir sua própria privacidade** – adicionando ou apagando conteúdo do seu próprio perfil (Stone, 2009).
7. Refere-se não apenas as transações do cliente com uma empresa mas também com **toda e qualquer interação do cliente com a empresa** (Greenberg, 2010).
8. A informação sobre um produto ou serviço não precisa ser obtida diretamente do fornecedor, e sim de **múltiplos canais** (Greenberg, 2010).

CRM e CRM Social: “Insights” (Greenberg, 2010)

CRM

- Insights e eficácia são alcançados pela visão única do cliente (dados) de todos os canais da empresa.
- A estratégia baseia-se no registo “completo” do cliente e integração de dados.

Social CRM

Insights são considerados mais dinâmicos e baseiam-se em:

- 1) Dados do cliente
- 2) Perfil pessoal do cliente na web e nas características sociais baseadas neste perfil
- 3) Participação do cliente na produção destes insights.

Social CRM Objectives And Capabilities

Business function	Social CRM objective	CRM 2.0 capabilities
Market research	Listening	Ongoing monitoring of your customers' conversations with <i>each other</i> , instead of occasional surveys and focus groups
Marketing	Talking	Participating in and stimulating two-way conversations customers have with <i>each other</i> , not just outbound communications to customers
Sales	Energizing	Making it possible for enthusiastic customers to help sell or make introductions to <i>each other</i>
Support	Supporting	Enabling your customers to support <i>each other</i>
Product/service development	Embracing	Helping customers work with <i>each other</i> to come up with ideas to improve products and services

Source: Adapted from Charlene Li and Josh Bernoff, *Groundswell: Winning in a World Transformed by Social Technologies*, Harvard Business Press, 2008

Source: Forrester Research, Inc.

“The average global corporation we deal with has 178 different Social Media Accounts” Marc Blinder, Adobe Inc.

<http://www.conferencebites.com/2013/03/adobe-summit-part-1/>

Mondelez

- 61 brands (Oreo, Chips Ahoy!, Milka, Toblerone, Cadbury, Trident, Chiclets, Halls)
- 165 different markets
- 250 social media accounts
- “mPulse Lab” platform that aggregates multiple data sources and monitors social engagement partnered with social vendor Expion to build it
- When a conversation spikes on Facebook for Mondelez, the **company is able to understand what about its post got people so excited and engaged**. It uses these learnings to **inform marketing in other channels, like TV**. As a result, **Mondelez is seeing that its TV spots are now twice as effective**

Ford

- 2 brands (Ford and Lincoln)
- 33 nameplates
- 5 continents
- 80 Facebook pages
- Salesforce’s Marketing Cloud to manage its social presences
- Ford has developed a framework for social media that it uses throughout the organization. Ultimately, the goal is to be seen as a leader using social as a business platform to enable overall business goals.
- “One of the things we’re working on is aligning the company on social in ways that go beyond marketing, customer service and communications, as the need for social for product development, human resources, IT and other functions is becoming apparent,” said Scott Monty, global head of social media at Ford

<http://www.digiday.com/brands/how-big-brands-organize-for-social/>

1 May, 2014

How KLM nails social customer care



By Ben Davis @Econsultancy

KLM

KLM Royal Dutch Airlines.

The flag carrier airline of the Netherlands.

Headquarters in Amsterdam.

KLM operates scheduled passenger and cargo services to more than 90 destinations worldwide.

It is the oldest airline in the world, still operating under its original name (Founded in 1919).

26M passengers each year.

https://econsultancy.com/blog/64779-how-klm-nails-social-customer-care?utm_medium=email&utm_source=Econsultancy&utm_campaign=4070509_1211-daily-pulse-uk-2014-05-02&dm_i=LQI.2F8TP.B284TQ.8T220.1#i.d3giv5l6ce73tl

Social CRM and Customer Care : KLM

- Dutch airliner KLM actively used Twitter and Facebook to update stranded passengers with the latest information regarding to the volcanic eruption in Iceland, and answered individual questions of customers regarding their cancelled flights and so forth (Mann, 2010);
- The 2010 ash cloud was a turning point for KLM. This was the first time they received questions coming through Twitter, and decided this was a comms channel that should be expanded;
- Fast forward to April 2014 and KLM receives around 35,000 questions every week on social media. 75% of these are on Facebook, with the other 25% predominantly on Twitter. That's a 250% increase YoY (year on year);

Social CRM and Customer Care : KLM

- KLM has **130** employees fully focused on social customer care. These staff don't answer email or a phone, they are **solely social**;
- At the moment, KLM endeavours to respond to a social enquiry within 60 minutes, though 23 minutes is the average response time. This is a 24/7 service and 10 languages are catered for;
- Staff receive **five weeks of training before qualifying for social customer care** and it's seen as a more nuanced job than call centre work. **Tone of voice** is an important part of this training, as is **commercial awareness**;
- Above all, the main goal of the social customer care team at KLM is to **ensure all questions can be answered** and **all issues resolved** through social media alone, if the customer chooses to use this channel;

Social CRM and Customer Care : KLM

- Social login is available on the KLM website. This helps the team because a social enquiry can instantly be tied to a booking if that person booked when logged-in via Facebook or Twitter;
- Social payment is also enabled with KLM through Twitter and Facebook. This system can be used to pay for tickets, upgrades etc. KLM sends a hyperlink to a secure payment environment through Twitter or Facebook to the customer. €100,000 was taken in just the first two weeks after launch in February 2014.

MARKETING

KLM's 150 social media customer service agents generate \$25M in annual revenue

JOHN KOETSIER, TUNE @JOHNKOETSIER MAY 21, 2015 2:49 AM

"It's first about service, then brand and reputation, but also about commerce ... we have to make money."

Gert-Wim ter Haar
Social Media Manager at KLM

<https://venturebeat.com/2015/05/21/klms-150-social-media-customer-service-agents-generate-25m-in-annual-revenue/>

Social CRM and Customer Care : KLM

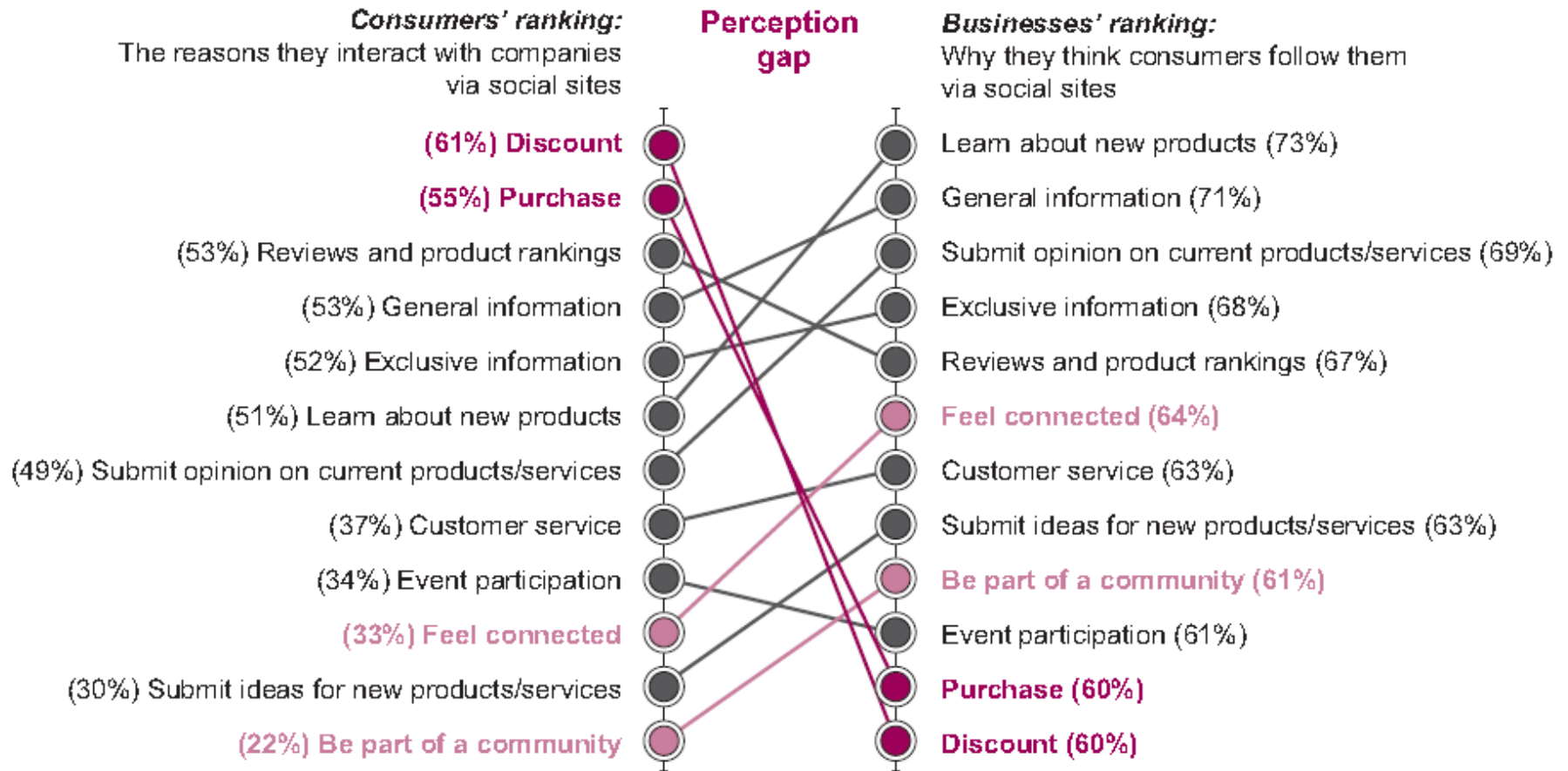
- Today, the airline has 150 people dedicated to serving clients via social, fields 70,000 queries a week, 24/7, in 14 languages.
- The data that KLM collects feeds into its social CRM efforts via Salesforce, where it ties Twitter handles or other social media data to customer records. Customer service agents can see the contextualized data in real time, and air crews can see it mid-flight – and add new insights – via an iPad application as well;
- All that data is increasingly being used in KLM's marketing in order to personalize communications and offers.

Social CRM and Customer Care : KLM

KLM loads more than 30,000 messages onto Salesforce on a weekly basis from social media alone, organized by language and topic and then routed to service teams worldwide who are able to assist with each specific query. Chatter allows service teams to collaborate on responses that require input from multiple teams and specialists.

“Now we can identify their experience at check-in, in the lounge, or when they’re collecting their bags. Any problems in any of these areas, and we are straight on the case via social media. That’s the power of the Salesforce.”

VIKTOR VAN DER WIJK, DIRECTOR OF DIGITAL MARKETING AT KLM



Notes: Consumer: $n = 1,056$; Business: Learn: $n = 333$, General info: $n = 336$, Submit opinion: $n = 334$, Exclusive info: $n = 333$, Reviews/rankings: $n = 333$, Feel connected: $n = 331$, Customer service: $n = 331$, Submit ideas: $n = 332$, Community: $n = 329$, Event: $n = 332$, Purchase: $n = 334$, Discounts: $n = 331$

Source: IBM Institute for Business Value analysis. CRM Study 2011

Referências

- American Express Small Business Saturday Facebook page, accessed January 2010, http://www.facebook.com/SmallBusinessSaturday?v¼app_165267296827487; “Who we are,” American Express Web site. <http://about.americanexpress.com/oc/whoweare/>; Small Business Saturday Web site, accessed January 24, 2011. <http://smallbusinessaturday.com/faq.html>; “Small Business Saturday (SM) firmly plants its roots between Black Friday and Cyber Monday.” American Express press release, December 2, 2010, <http://about.americanexpress.com/news/pr/2010/post-sbs.aspx>
- Baird, C. H.; Parasnis, G. (2011) From social media to social customer relationship management. *Strategy & Leadership*. 39 (5), 30-37.
- Boyd, D. M., & Ellison, N. B. (2007). Social network sites: Definition, history, and scholarship. *Journal of Computer-Mediated Communication*, 13(1), article 11.
- Cormode, G., & Krishnamurthy, B. (2008). Key differences between Web 1.0 and Web 2.0. *First Monday*, 13(6), 2.
- DiMaggio, P. J., and W. W. Powell 1983 "The iron cage revisited: Institutional isomorphism and collective rationality in organizational fields." *American Sociological Review*, 48: 147-160.
- Faase, R., Helms, R. and Spruit, M. (2011) ‘Web 2.0 in the CRM domain: defining social CRM’, *Int. J. Electronic Customer Relationship Management*, Vol. 5, No. 1, pp.1–22.

Referências

- Greenberg, P. (2009) 'Do we really NEED CRM 2.0?', available at <http://blogs.zdnet.com/crm/?cat=5> (accessed on 27 April).
- Greenberg, P. (2010) The impact of CRM 2.0 on customer insight. *Journal of Business & Industrial Marketing*, 25 (6), 410-419.
- Hudson, Susan C., and Roberts (Camp), Karla, K. (Summer, 2012). Drafting and Implementing an Effective Social Media Policy. *Texas Wesleyan Law Review*, Vol. 18, pp. 767-794.
- Kamath, J.P. (2008) 'Businesses can boost innovation with Web 2.0 technology, Gartner says', available at <http://www.computerweekly.com/Articles/2008/05/13/230665/businesses-can-boost-innovation-with-web-2.0-technology-gartner.htm> (accessed on 21 May 2010).
- Kaplan, A., & Haenlein, M. (2010). Users of the world, unite! The challenges and opportunities of social media. *Business Horizons*, 53(1), 59–68.
- O'Reilly, T. (2005). Web 2.0: compact definition. *Message posted to* http://radar.oreilly.com/archives/2005/10/web_20_compact_definition.html.
- Parameswaran, M., & Whinston, A. B. (2007). Social computing: An overview. *Communications of the Association for Information Systems*, 19(37), 762-780.

Referências

Shimp, B. (2009) .‘Social CRM. Say what?’, available at <http://allbizanswers.com/2009/05/social-crm-say-what/> (accessed on 19 May 2010).

Smith, Michael C. (Spring, 2012). Social Media Update. *The Advocate*, Vol. 58, pp. 1-12.

Stone, M. (2009). Staying customer-focused and trusted: Web 2.0 and Customer 2.0 in financial services. *Database Marketing & Customer Strategy Management*. 16 (2), 101-131

Wang, F. Y., Carley, K. M., Zeng, D., & Mao, W. (2007). Social computing: From social informatics to social intelligence. *Intelligent Systems, IEEE*, 22(2), 79-83.