

CUSTOMER EQUITY MANAGEMENT

顾客资产管理

Roland T. Rust
Katherine N. Lemon 著
Das Narayandas



北京大学出版社
PEKING UNIVERSITY PRESS



营销学精选教材·英文影印版

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出版者说明

进入 21 世纪,市场营销科学在中国开始向纵深发展,一方面,广大营销学者继续追踪国际学术界在市场营销研究前沿的探索 and 深化,另一方面,学者们也在致力于发展对中国现实更具解释力的营销理论,并且在这两个方面,都取得了非常实质性的进步和成果。营销学是一门应用科学,随着社会和经济的发展,许多新问题、新现象不断出现,新的营销理论和观点也纷纷出现,国内外学术界的研究兴趣点也就相应发生变化。在中国,营销现实日渐变得丰富多样,理论研究逐步规范化和科学化,高等院校的教学内容和方式也随之发生了很大变化,教师和学生都不再满足于 20 世纪 80 年代引进的一批偏重管理学的“营销学理论”教科书。营销学科在中国的日渐成熟和发展,迫切要求具有更高学术水平和更强现实指导能力的教科书,不但能够带给学生最前沿、最深刻的学术思想和从事研究的科学方法,而且教给学生在实际工作中进行正确决策的科学指导。

基于此,北京大学出版社引进出版了《营销学精选教材》系列丛书(本丛书包括影印版和翻译版,个别影印版有局部删节),在选择这些书的过程中,我们得到了北京大学光华管理学院郭贤达老师,西安交通大学管理学院庄贵军老师,武汉大学经济管理学院汪涛老师,大连理工大学管理学院董大海老师,中国人民大学商学院李先国老师等学者的真诚帮助,在此,对他们表示最诚挚的感谢!我们希望这些书带给广大读者的是对营销科学的兴趣和激情,是深刻的学术思想和科学的研究方法,是从事营销实际工作时最好用的工具,同时也是广大教师和学生最好用的教科书。

《营销学精选教材》是一个开放的系列,根据现实情况的发展和需要,我们还会陆续引进其他品种,在此,诚邀各位专家学者热情推荐优秀的营销学图书(em@pup.pku.edu.cn)。此外,真诚欢迎广大读者在使用过程中对我们的图书提出宝贵的意见和建议。

北京大学出版社
经济与管理图书事业部
2005 年 12 月

丛书序言

20世纪80年代,市场营销学开始在我国迅速传播和发展。80年代以来,设立该专业或开设市场营销学课程的高等院校数量显著增多,研究工作亦有显著的进展。尤其是90年代以来,随着中国市场化改革进程的加快,社会急需大量的受过专业训练的市场营销人才,更是推动了我国高等院校中市场营销专业教育的迅猛发展。自此以后,市场营销学可以说是基本上实现了在我国的启蒙和普及。

随着第一阶段启蒙和普及目标的实现,当前国内对于市场营销的研究和教育开始向两个方向发展:其一就是对当前国际学术界在市场营销研究前沿的追踪和深化;其二就是结合国内市场环境的特点和经济发展的需要,实现市场营销理论的本土化,发展对中国现实更有解释力的市场营销理论。我想,这两个方向会在相当长一段时间内影响国内市场营销学的研究和教育。

营销研究的转型必然要求营销知识的传播机构,主要包括高等教育机构以及出版机构,也要做相应调整。以出版为例,在20世纪营销知识的传播和普及中,出版机构扮演着非常重要的角色。实际上,正是菲利普·科特勒博士的《营销管理》教材的引入(我印象中最早的版本是科学技术文献出版社出版的第6版)奠定了国内营销研究的学科基础,而该书从第6版直到第11版的先后引入,也见证了国内市场营销学科快速发展的历程。可以说,在国内其他领域,还很少看见一本教材会对一个学科的教学和研究能产生如此巨大和广泛的影响。然而,从另一个角度,这也许同样暴露出当前国内营销知识传播中所面临着的尴尬境地:如果说一门学科可以只用一本教科书来概括,至少说明我们对这个学科的理解和解说还缺乏足够的甚至是必要的张力和活力。

首先,按照美国市场营销学会会刊主编瓦格纳·卡马库拉的观点,市场营销学是在管理学、行为科学(心理学和社会学)和定量分析(数学和计量经济学)这三门较成熟学科的基础之上发展起来的独立学科。因此,市场营销学之中有三个侧重:侧重于管理学的叫做“市场营销学理论”,侧重行为科学的称为“消费者行为学”,而侧重营销方法论以及由此延伸出的定量分析手段的则是“市场营销科学”。所以,在市场营销的知识体系中,科特勒博士的《营销管理》只是涉及市场营销理论部分(我个人认为,本书只是营销学的入门读物,对于研究生以上层次并不适用),而营销科学(研究方法)以及消费者行为理论却没有得到同样的重视。

其次,不可否认,科特勒博士的《营销管理》确实是一本非常好的教材,他为市场营销学构建了一个较为全面的分析框架,但是他更强调一个完善的理论体系的勾勒,强调对众家之言的兼容并包,对该体系中的很多主题,却缺乏更详细的扩展和讨论。例如,渠道策略和价格策略是该书公认的薄弱章节。

最后,有些新的营销理论和观点,由于研究视角和范式的不同,很难被该书兼容,因而得不到全面的体现,如服务营销、关系营销以及组织市场营销等。

因此,也许除了科特勒,我们还应该再看点别的。

所以,我们迫切需要更加丰富和高质量的市场营销出版物。

北京大学出版社所引进出版的“营销学精选教材”则很好地顺应了这一要求。目前入选该套丛书的著作有三本,分别是 Roland T. Rust, Katherine N. Lemon 和 Das Narayandas 合作撰写的 *Customer Equity Management*, Roger J. Best 教授撰写的 *Market-based Management: Strategies for Growing Customer Value and Profitability* 以及 James C. Anderson 与 James A. Narus 撰写的 *Business Market Management: Understanding, Creating, and Delivering Value*。这是一个开放性的书系,以后还将根据需要,陆续引进其他的品种,欢迎各位专家学者的推荐。

这些入选著作有一些共同特点:其一,这些作者均系出名门,具有深厚的理论素养,在各自领域中均为蜚声世界的大家。其二,虽然这些著作都具有极强的学术价值,但全然不是“书斋的学问”。由于这些作者在理论研究之余,均具有丰富的咨询和实践经验,这就决定了这些著作不会耽于说教、“语言无味,面目可憎”,而是深入浅出,令人耳目一新。

一般说来,一本好的营销学教材应该具备如下的重要特点:首先,一本好书应根植于对某一领域的实际研究,而许多书籍只是给学生提供了一个基于抽象的理论基础上的简单的提纲。另外,一本好书应该让学生和营销实践者们很容易看懂,并能在其指导下制定成功的策略,为此,好的教材应列举大量的相关案例,分析具有创造性的策略并结合实际进行评述。而很多书籍要么在论述时缺乏丰富的案例,要么在分析时缺乏理论的深度。

而在这两方面,该套丛书均表现出优秀教材的素质:大度、深刻且平易近人,相信它不仅对于市场营销理论的研究和学习,而且对于营销实务的操作和实践,都是极好的指南。

汪涛

武汉大学市场营销系教授

2005年10月于珞珈山

关于本书

适用对象

营销、管理或者金融领域,任何希望增长企业长期价值的人都会发现本书是很有价值的。想要学习先进战略工具的学生和从业人员,通过本书将会有很大收获。学过营销基本课程且希望掌握高级营销策略的本科生和 MBA 学生,也会发现本书是很有用的。本书也适用于营销专业人士和咨询师以及人力资源开发和公司培训。

内容简介

本书介绍了理解顾客资产管理理论所必需的概念和分析工具,作者以清晰和准确的语言对这些概念和工具进行了阐述,并且以案例穿插其中,使读者能够联系现实环境运用这些概念。这种新工具与案例的结合为教师教授本书提供了灵活的选择,并且为学生提供了实践和运用这些新工具的机会。

本书包括:第一部分(第 1—4 章)勾勒出顾客管理的框架。第二部分(第 5—9 章)阐述了如何选择顾客并提供有特色的顾客管理战略。第三部分(第 10—13 章)集中于顾客资产管理战略实施的度量、监控和评价。

关于作者

• Roland T. Rust 是马里兰大学商学院市场营销系教授、服务绩效中心主任。他的成就包括:美国市场营销协会市场调研 Gilbert A. Churchill 终身成就奖、美国广告学会广告研究杰出贡献奖、美国市场营销协会服务学科职业贡献奖。他曾经获得 *Marketing Science*, *Journal of Marketing Research*, *Journal of Marketing*, *Journal of Advertising*, *Journal of Retailing* 的最优论文奖以及美国营销科学院(MSI)的 Robert D. Buzzell 最优论文奖。他的书 *Driving Customer Equity*, 获得 2002 年 Berry-AMA 近 3 年最优秀的营销学图书奖。

• Katherine N. Lemon 博士是波士顿大学管理学院副教授,她是顾客资产管理和营销战略领域公认的专家,曾在多家全球领先的公司中担任咨询工作。她同时还是 *Journal of Marketing*, *Journal of Service Research*, *Journal of the Academy of Marketing Science*, *International Journal of Electronic Commerce*, *Journal of Interactive Marketing* 的编委会成员以及 AMA 学术委员会成员。她的著作有: *Driving Customer Equity*, *Wireless Rules*。

• Das Narayandas 博士是哈佛商学院工商管理教授、哈佛商学院高级销售人员和营销总监组织营销战略项目的主席。Narayandas 教授的经历包括在现场销售、销售队伍管理、新产品开发、联盟形成和营销沟通领域 6 年的跨国公司管理经验,他也曾经在多个国际权威营销学杂志上发表过论文。

本书特色

- 本书是国内第一本关于顾客资产管理的最具权威性的图书。

• 本书行文简洁明了、论述集中,包括大量实用工具和案例,是经理、学生和教授们的工具书。

• 本书按照战略性顾客资产管理计划的流程来组织。

简要目录

第一部分 理解和分析顾客资产的工具

第一章 顾客资产管理战略概述

第二章 顾客资产方法与顾客管理计划

第三章 顾客资产分析

第四章 顾客资产度量

第二部分 顾客资产管理战略开发

第五章 顾客选择

第六章 塑造和管理品牌资产

第七章 塑造和管理价值资产

第八章 管理关系资产

第九章 运用多渠道组合中的多接触点管理

顾客资产

第三部分 顾客资产管理战略的度量、监控和评价

第十章 战略实施:为最大影响投资

第十一章 组织市场的顾客盈利性管理

第十二章 CRM技术在顾客管理中的作用

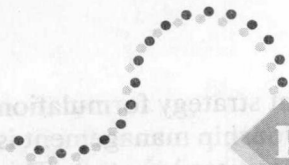
第十三章 顾客管理如何改变营销

索引

教辅产品

请反馈本书最后的教学支持说明,培生公司将提供相应教辅。

To Chiharu (RTR)
To Loren and Thomas (KNL)
To Sunitha, Rohan, and Amit (DN)



Preface (for Instructors)

HOW THE BOOK IS STRUCTURED

In *Customer Equity Management*, we present the concepts and analytic tools necessary to understand the concept customer equity management. These concepts and tools are presented in a clear and concise format, and are interspersed with cases that allow the reader to integrate and apply the concepts in real-world settings. This combination of new tools and case applications provides instructors with flexibility in teaching the material, and provides students with the opportunity to practice and use new tools. Specifically, the book is structured as follows:

Part I (Chapters 1–4) outlines the framework for customer management used throughout the book. In particular, following the introductory Chapter 1, Chapter 2 presents the key components of customer equity: value equity, brand equity, and relationship equity. The chapter introduces distinct customer management strategies to show how the three components work, independently and together, to grow the long-term value of the firm through the ultimate source of that value—the firm’s customers. Finally, this chapter outlines the customer management plan—a point-by-point plan for developing and implementing customer management strategy.

Chapter 3 describes customer equity analysis. This chapter focuses on the specific steps in the analysis that are necessary for a firm to begin to develop a strategic customer management plan: analyzing the market, analyzing the firm’s performance, comparing the firm’s performance to its competitors, and determining where the firm should focus its efforts.

In order for the customer equity approach to be truly effective, it is necessary to understand how to put the approach into practice. Chapter 4 provides a detailed look at the underlying mathematical models used in measuring customer equity. A case study provides opportunities to apply and practice the analysis tools at the end of Chapter 4.

Part II (Chapters 5–9) examines how to select customers and provides distinct customer management strategies. Effective customer management strategy begins with careful selection of customers or opportunities to serve. Chapter 5 focuses on the importance of customer selection decisions. Having selected the opportunities to serve, firms then need to formulate and implement strategies to satisfactorily and profitably serve customers and opportunities. Chapters 6, 7, and 8 examine brand equity, value equity, and relationship equity, respectively, in detail. Each chapter defines and explains the importance of each component of customer equity and the circumstances and contexts in which it is likely to be a key consideration in managing the customer relationship. In addition, the chapters examine the key, actionable drivers of brand, value and relationship equity, and describe the types of strategies firms can use to build customer equity through each driver.

Chapter 9 moves the discussion from customer management strategy formulation to customer interaction management. Successful customer relationship management is built on effective management of vendor-initiated and customer-initiated contacts. This chapter shows how firms can leverage interactive technologies to have two-way communications with customers using multiple channels concurrently, to learn more about their customers, and to enhance the value of their offerings.

Part III (Chapters 10–13) focuses on measuring, monitoring and evaluating results. Once the appropriate customer mix has been determined and the firm has determined key actions that will grow long-term profitability, it is important to measure and monitor the effects of marketing actions. Chapter 10 provides an introduction to the analyses necessary to evaluate potential marketing strategies and to determine which marketing actions will have the strongest effect on long term profitability through customer equity. This chapter explains how firms can evaluate distinct marketing investment opportunities to determine which marketing actions will have the strongest ROI. It also discusses the importance of considering competitive actions and how to evaluate the success (or failure) of a marketing initiative. A case study allows further investigation at the end of Chapter 10.

Chapter 11 highlights the difficulty that business marketers face as they attempt to manage profitability of individual customers. We review existing methodologies used by firms to link their customer management effort (costs) with revenues received at the level of individual customers. The chapter then details aggregate methodologies (for example, managing customer segments for profits rather than individual customers) that can be used by firms that do not have the systems in place to accurately measure costs and revenue streams at the individual customer level.

Chapter 12 discusses CRM software products and how they integrate with key customer management strategies. We also examine typical implementation issues to help ensure initial success and the eventual demonstration of ROI by measures defined in the planning process. Finally, we look at specific vendor products in the market, their application, and how current marketing trends are impacting CRM software.

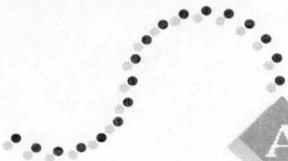
The final chapter of the book provides a look to the future. Chapter 13 focuses on the ways in which customer management is changing the nature of the marketing function itself. By bringing together the new customer management tools and new customer management approach discussed throughout the book, we examine the ways in which marketing is in the process of transforming from a product and transaction focus to a customer and relationship focus, and what this will mean for firms seeking to grow profitability during this transformation.

KEY FEATURES

This book has been developed as a tool for managers, students, and professors. To facilitate learning, it is organized around the strategic customer equity management plan for developing profitable marketing strategies. The chapters are short, and focused on key topics. The book contains real tools, including two cases on the accompanying CD using proprietary analytic software tools developed by the authors. Relevant cases are included to enable students to apply their new knowledge and tools in real-world situations.

WHO SHOULD READ THIS BOOK

Anyone in marketing, management, or finance who wants to grow the long-term value of the firm will find this book valuable. In particular, students and practitioners who want to learn cutting-edge strategic tools will gain much from this book. Undergraduate or MBA students who have taken a basic marketing course and want to master advance marketing strategy will find the book useful. The book is also appropriate for executive development and corporate training. Finally, marketing professionals and consultants will also enjoy this book.



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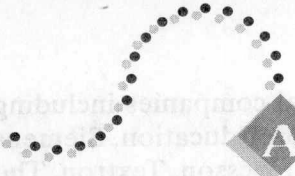
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