顧客關係管理

創造顧客價值

胡政源◎編著

Customer Relationship Management

To Create Customer Value

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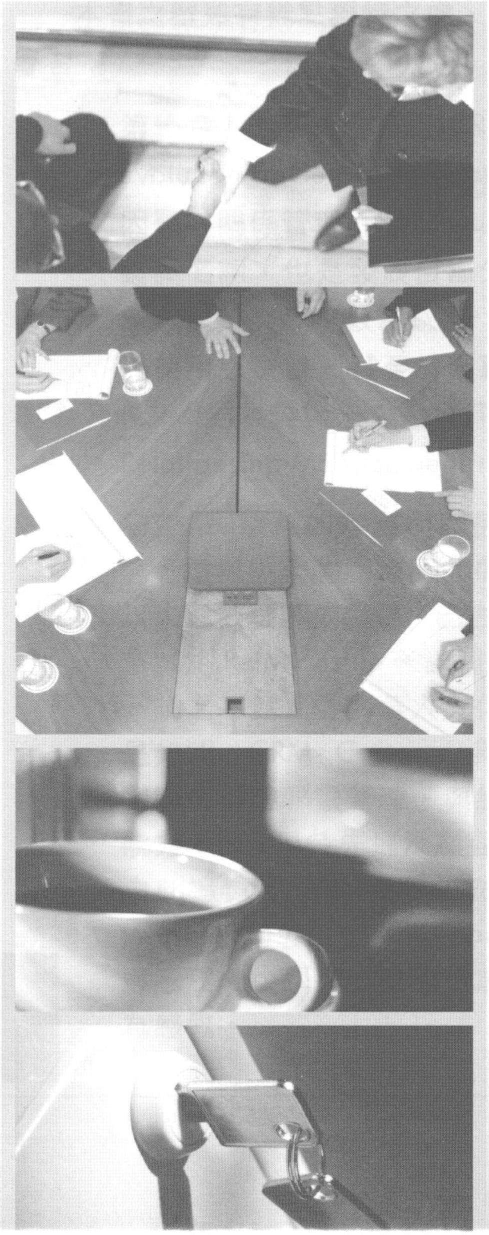
顧客關係管理

創造顧客價值



胡政源◎編著

暨南大學圖書館藏書

Customer Relationship Management

To Create Customer Value

國家圖書館出版品預行編目資料

顧客關係管理 / 胡政源編著, -- 初版. --
臺北縣中和市：新文京開發, 2007（民 96）
面； 公分

ISBN 978-986-150-756-9 (平裝)

1. 顧客關係管理

496.5 96020073

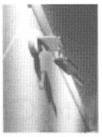
顧客關係管理 （書號：**H158**）

編著者 胡政源
出版者 新文京開發出版股份有限公司
地址 台北縣中和市中山路二段 362 號 8 樓（9 樓）
電話 (02) 2244-8188（代表號）
FAX (02) 2244-8189
郵撥 1958730-2
初版 西元 2007 年 10 月 30 日

有著作權 不准翻印

建議售價：530 元
法律顧問：蕭雄淋律師
ISBN 978-986-150-756-9

序言
PREFACE

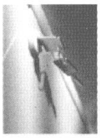


本書《顧客關係管理》共分十章，第一章 顧客關係管理(CRM)的本質與未來發展-The Nature and the Evolution of Customer Relationship Management；第二章 關係的本質與關係管理；第三章 行銷策略規劃；第四章 顧客關係管理的前身—關係行銷；第五章 顧客關係管理的內涵；第六章 顧客服務品質及顧客滿意度；第七章 顧客忠誠度與顧客權益；第八章 顧客(消費者)品牌關係管理；第九章 顧客(消費者)基礎品牌權益；第十章 電信服務業應用顧客關係管理建構客服營運模式之研究。

本書之撰述有幾點獨特之處，謹此就教學先進及顧客關係管理(CRM)研究學者：

第一：第一章 顧客關係管理(CRM)的本質與未來發展-The Nature and the Evolution of Customer Relationship Management；全文用英文撰述，係因顧客關係管理(CRM- Customer Relationship Management)係為國外翻譯名詞，也是發展自國外的觀念，欲探討顧客關係管理(CRM)的本質，以英文呈現較為適宜；再者國內大學為提昇學生英文程度，常希望使用原文書，甚至於鼓勵教師用英文教學；第一章 顧客關係管理(CRM)的本質與未來發展-The Nature and the Evolution of Customer Relationship Management，是一種嘗試。

第二：第二章 關係的本質與關係管理嘗試敘述華人文化之關係(Guanxi)理論，並與歐美的關係(Relationship)理論稍加比較，Relationship 一詞多年來已被翻譯成關係，已占用華人文化真正之關係(Guanxi)用詞，作者嘗試將 Relationship 一詞翻譯成關聯或聯繫，因此才能呈現 Relationship 一詞之本質，並與華人文化中真正之關係(Guanxi) 用詞進行區辨；但是如此，CRM- Customer Relationship Management 則必須翻譯成顧客關聯或顧客聯繫管理，與約定成俗之顧客關係管理名詞不同，非個人能力所及，只待先進及顧客關係管理(CRM)研究學者思考或領導成俗。由此追憶起先師楊必立教授將早期市場學(Marketing)翻譯成行銷學(Marketing)，由此行銷(Marketing)一詞開始真正道出 Marketing 之本質與意涵，後學者跟隨約定成俗；楊師必立教授開創行銷風氣之先，甚為感佩。



第三：顧客關係管理應用範圍廣泛，可以是 B to B，也可以是 B to C；若是 B to C 應用領域，消費者（顧客）與品牌（產品或服務、公司或企業）的關係管理就成為顧客關係管理必須處理的核心議題；第八章 顧客（消費者）品牌關係管理與第九章顧客（消費者）基礎品牌權益，就是闡釋消費者（顧客）與品牌（產品或服務、公司或企業）的顧客關係管理議題。

第四：由於資訊科技的快速發展，顧客關係管理(CRM)的應用也產生變化，CRM 甚至於成為電腦軟體之代名詞；顧客關係管理(CRM)也有成為資訊管理科系的必修及專用課程之趨勢；本書是為企業管理科系的顧客關係管理(CRM)課程而撰述的，故對於資訊科技或電腦軟體的顧客關係管理(CRM)之資訊管理焦點，是另外一種不同的策略及哲學觀點，強調的是顧客關係管理的本質，亦即創造顧客價值，是關係行銷(Relationship Marketing)為核心的觀點。

《顧客關係管理》一書之完成，必須對多年來協助本人出版的新文京開發出版股份有限公司致上謝意。多年來文京出版集團即協助本人出版過下列書籍，以供大專院校莘莘學子研讀，對文京出版集團之努力用心，甚為感佩。

1. 胡政源，民國 95 年 10 月，品牌管理，新文京開發出版股份有限公司出版，台北。ISBN: 986-150-498-2
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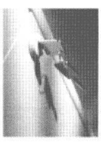

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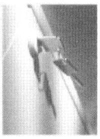
9. 胡政源，民國 88 年 9 月，企業管理綜合個案研究，文京圖書股份有限公司出版，台北。ISBN: 657-512-231-3

作者　**胡政源**　謹誌

中華民國 96 年 9 月 21 日星期五



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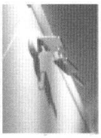

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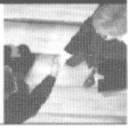

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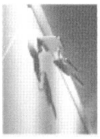

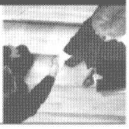

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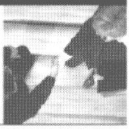

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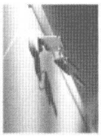

Chapter 1

顧客關係管理(CRM)的本質與未來發展

The Nature and the Evolution of Customer Relationship Management

Jackson C.Y. Hu
胡政源

Abstract

Describing the nature of customer relationship management(CRM), this article explores the evolution of customer relationship management and the current challenges for relationship concepts posed for buyers and sellers in a value network context. Value networks can and, often, do interfere with customer relationships and thereby call for a broader range of concepts to analyze and understand relationship management and the influence of value networks on relationships in business-to-business markets. So, this article further explores and introduces a systematic approach for managing business networks. The VNM(value network management) approach includes three basic elements: (1) identifying a value network, (2) strategies for managing actors of the value network, and (3) developing and applying operational level methods for managing actors within the value network.

Keywords: Customer relationship management; Value networks; Value network management, VNM

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1.1 Introduction

The success of companies like Dell, Nike, or Cisco, and other such companies with similar business models based on the integration of value networks, has called attention to business models based on relationship concepts, such as CRM(customer relationship management) or relationship marketing. This development was envisioned by early pioneers in relationship concepts in both the academia and management(Anderson & Narus, 1998 and Peppers & Rogers, 2001).

During the past 10 years, there has been a growing list of articles concerning customer relationship management (CRM) or the management of the mutually beneficial relationship from the seller's perspective. But, concepts such as relationship marketing or CRM are used with a variety of sometimes contradictory connotations. As argued, relationship marketing has not developed to a discipline yet(Parvatiyar and Sheth,1999). This statement probably holds true for CRM, where different notions of process, strategy, philosophy, capability, and technology- based CRM abound. Nevertheless, relationship concepts are most likely in the early stages of their life cycle. The management and academia have yet to come to an agreement about the major issues or to clearly define objectives, concepts, and tools required in CRM (Zablah, Bellenger, and Johnston ,2004).

Zablah, Bellenger, and Johnston (2004) investigate the range of contradictory research on CRM. While much of recent CRM research seems prompted by the highly publicized failure of CRM initiatives, the reason for much of the inconsistent appears to be due to the lack of a common conceptualization. Early CRM ideas evolved from the key account sales literature, but soon CRM established itself as a separate area of research and of management practice; advances in information and data base technologies allowed CRM to become better focused and to hone in to individual customers to a degree never before possible

Otherwise, Ehret(2004) reviews the current state of CRM research in business-to- business markets and describes the nature of the problem between relationships and value networks. He also deeply traces CRM development from the early work on buyer–seller relationships to newer research that describes the rise of value networks. Value networks can and often do interfere with customer relationships and thereby call for a broader range of concepts to analyze and understand relationship management and the influence of value networks on relationships(Ehret, 2004). How can concept development of CRM or relationship marketing evolve in value network context? To date, it remains doubtful whether dyadic relationship concepts can be applied to value network contexts without modifications (Ritter, Wilkinson, & Johnston, 2004).

For many years, research and management thinking has focused on understanding business relationships and value networks. Now, the focus is shifting to managing business relationships and value networks. This new approach focus poses two questions. Since business networks are loosely coupled systems, to what extent are value networks manageable? Furthermore, how can a firm's ability to manage a value network be characterized and constructed? This article addresses these two questions by synthesizing the current state of knowledge on relationship management in value networks and the managerial abilities in complex relationships. The discussion leads to the abilities firms will need to successfully manage complex business value networks. This article also explores the current challenges for relationship concepts posed for buyers and sellers in a value network context and further proposes a systematic approach for managing value networks-VNM(value network management).The VNM approach includes three basic elements: (1) identifying a value network, (2) strategies for managing actors of the value network, and (3) developing and applying operational level methods for managing actors within the value network. The VNM approach is not only focused on using value network to fulfill existing needs, but also on discovering new opportunities(An opportunity is anything that potentially represents or results in value to the network.) and establishing and managing value network to realize these opportunities.

1.2 Divergent perspectives on CRM

As a cursory review of the literature is likely to reveal, numerous definitions of CRM have been proposed by marketing practitioners and scholars alike. While some of these conceptualizations are similar, there is definitely a lack of consensus as to the most appropriate way in which this emerging phenomenon should be defined. In an attempt to develop a conceptualization that captures the true meaning of CRM, an extensive review of the extant literature was conducted. Aside from published and working academic papers, the review also included vast amounts of literature from the popular domain. For instance, articles posted on key CRM web portals were evaluated (e.g., CRM Community, 2003; CRM Guru, 2003; CRMXchange, 2003; Destination CRM, 2002; European Centre for Customer Strategies, 2003 and ITtoolbox.com, 2003), as well as definitions offered by the top CRM software manufacturers and providers (e.g., Siebel, Oracle, SAS). Overall, the literature review yielded approximately 45 distinct definitions of CRM.

A detailed analysis of the identified conceptualizations was conducted to identify common elements and recurring themes among them. The analysis revealed that, collectively, the definitions advance five major perspectives on CRM. More specifically, it was found that CRM has, implicitly or explicitly, been conceptualized as a (1) process (e.g., Day & Van den Bulte, 2002; European Centre for Customer Strategies, 2003; Galbreath & Rogers, 1999; Gronroos, 2000; Plakoyiannaki & Tzokas, 2002; Reinartz et al., 2003 and Srivastava et al., 1999); (2) strategy (e.g., Adenbajo, 2003; CRM Guru, 2003; Croteau & Li, 2003; Deck, 2003; Destination CRM, 2002; IT Director.com, 2003; Kracklauer et al., 2001; Tan et al., 2002 and Verhoef & Donkers, 2001); (3) philosophy (e.g., Fairhurst, 2001; Hasan, 2003 and Piccoli et al., 2003); (4) capability (e.g., ITtoolbox.com, 2003 and Peppers et al., 1999); and/or (5) technological tool (e.g., Gefen & Ridings, 2002 and Shoemaker, 2001). Although individual definitions tended to advocate a specific perspective, it was not uncommon to find conceptualizations that simultaneously stressed multiple perspectives at a time (e.g., Kim et al., 2003; Pantazopoulos, 2003 and Rigby et al., 2002).

1.2.1 CRM as a process

A process refers to a collection of tasks or activities that together result in a desired business outcome (Davenport & Beers, 1995; Davenport & Short, 1990 and Hammer, 1996). Stated differently, a business process refers to a group of activities that convert organizational inputs (e.g., human resources) into desired outputs (e.g., successful new products). Given that groups of tasks can be subdivided or aggregated into lower and higher level processes, the specific nature (i.e., inputs and outputs) of a business process depends on the level of aggregation used to define it (Fahey, Srivastava, Sharon, & Smith, 2001). For instance, Srivastava et al. (1999) define CRM as a macrolevel (i.e., highly aggregated) process that subsumes numerous subprocesses, such as prospect identification and customer knowledge creation. Moreover, they suggest that these subprocesses can often be further separated into more refined microlevel processes (e.g., data collection and storage is a microlevel process that forms part of the customer knowledge creation subprocess). Thus, for any given set of tasks, the specification of the required inputs and intended outputs depends entirely upon how the constituent activities are aggregated.

When viewed as a process, CRM has been defined at two different levels of aggregation. More specifically, some have defined it as a higher level process that includes all activities that firms undertake in their quest to build durable, profitable, mutually beneficial customer relationships (e.g., Plakoyiannaki & Tzokas, 2002; Reinartz et al., 2003; Shaw, 2003 and Srivastava et al., 1999). Yet, others have construed it more narrowly and define it as a process that is concerned with managing customer interactions [1] for the purpose of promoting the establishment and maintenance of long-term, profitable relationships (e.g., Day & Van den Bulte, 2002; Galbreath & Rogers, 1999 and Kohli et al., 2001). Comparatively speaking, then, the former perspective defines CRM as a macrolevel process, while the latter focuses exclusively on interaction management, arguably one of the subprocesses subsumed under the macrolevel perspective (Hirschowitz, 2001 and Reinartz et al., 2003).

Regardless of the level of aggregation used to define CRM, this view is different from all others in that it accounts for the process aspects of relationship development and maintenance. That is, the process perspective is the only one that overtly acknowledges that buyer–seller relationships develop over time (i.e., are characterized by a lifecycle) and must evolve to perdure (cf. Dwyer et al., 1987; Gronroos, 2000 and Parvatiyar & Sheth, 2000). In fact, it is due to this reason that emerging academic research favors and advocates the process perspective of CRM (e.g., Day & Van den Bulte, 2002 and Reinartz et al., 2003). Nonetheless, it is also important to underscore that the usefulness of this view is limited by the fact that CRM has been defined at different levels of aggregation, and thus, it is unclear which tasks would be subsumed under such a process and what its requisite input and intended output would actually be.

1.2.2 CRM as a strategy

Strategy is defined as an "overall plan for deploying resources to establish a favorable position" (Grant, 1998, p. 14). The strategic view of CRM emphasizes the fact that resources destined for relationship building and maintenance efforts should be allocated based on customers' lifetime value to the firm (i.e., estimated net profits over the course of the relationship; CRM Guru, 2003; IT Director.com, 2003; Kracklauer et al., 2001 and Tan et al., 2002). More specifically, this view suggests that all customers are not equally valuable and that, therefore, maximum profitability can only be achieved when available resources are invested in customer relationships that provide a desired level of return (Ryals, 2003). The main implication stemming from the strategic perspective is that firms must continually assess and prioritize customers based on their expected lifetime value—if they are to build long-term, profitable customer relationships.

Those who define CRM as a strategy also tend to emphasize that it enables firms to build the "right" type of relationship with each individual customer, which, in some instances, implies choosing not to build one at all (Kracklauer et al., 2001 and Verhoef & Donkers, 2001). The focus of this view of CRM is not on how relationships are developed and maintained, but more so on how building the right type of relationships can have a substantial positive impact on corporate profitability. Hence, closely associated with this view of CRM is the notion that customer relationships should be treated as a portfolio of assets or investments that need to be actively managed to maximize profitability (Plakoyiannaki & Tzokas, 2002; Ryals, 2002; Ryals, 2003 and Ryals & Knox, 2001). While the application of portfolio theory to customer relationships predates the CRM era (e.g., Jackson, 1985), it is increasingly receiving attention in the CRM literature and is touted as a valuable tool for enabling firms to identify an optimal combination of customers in which to invest their limited resources (Turnbull et al., 1996).

1.2.3 CRM as a philosophy

The recent emphasis on CRM stems, in part, from the research of Reichheld (1996), which demonstrated that a strong link exists between customer loyalty and corporate profitability. When defined as a philosophy, CRM refers to the idea that the most effective way to achieve such loyalty is by proactively seeking to build and maintain long-term relationships with customers. Rather than treating recurring transactions between buyers and sellers as isolated events, the philosophical view of CRM stresses that a loyal customer base can only be achieved if interactions are viewed within the context of an ongoing relationship (Piccoli et al., 2003 and Shahnam, 2003).

As a business philosophy, CRM is inextricably linked to the marketing concept (Hasan, 2003 and Shahnam, 2003), which stresses that firms must organize around and be responsive to their customers and their changing needs (Kohli & Jaworski, 1990 and Narver & Slater, 1990). That is, the philosophical perspective recognizes that in order for exchange relationships to last, selling firms must be able to continually deliver what their customers value—a feat that is best accomplished by those firms that boast a customer-centric culture (Rigby et al., 2002 and Wilson et al., 2002). Moreover, this perspective effectively builds a bridge between the marketing concept and relationship marketing paradigm and focuses on the importance of creating customer value, something that is only implied in the other perspectives. Stated differently, this view suggests that to build long-term, profitable relationships, it is critical that firms' day-to-day activities be driven by an understanding of customers' evolving needs.

1.2.4 CRM as a capability

Grant (1991) distinguishes between resources and capabilities. Resources include factors of production such as capital equipment, the skills of individual employees, and patents. Capabilities, on the other hand, refer to the "capacity for a team of resources to perform some task or activity. While resources are the source of a firm's capabilities, capabilities are the main source of its competitive advantage" (Grant, 1991, p. 119). Unlike resources, capabilities are typically knowledge-based, are complex, and cannot simply be purchased or acquired in factor markets (Grant,

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