APPENDICES

APPENDIX 4.1 : INTERVIEW GUIDELINE

Area	Questions
Marketing history	What is the development of marketing activities in your company?
	Can you tell me why your company focuses a lot on customer relationship now?
Definition of CRM	What does the term CRM mean to you and your company?
	How does senior management team view the CRM concept?
Ways in implementing CRM	What are the CRM related activities in your company?
	What system / IT does your company use to support the CRM program?
Drivers in adopting CRM	For what reasons did your company decide to adopt CRM?
	Is there any relationship with competition issue?
	How top management feel about the CRM adoption?
	Is there any relationship with customers' requirement?
	How does the whole organization react to the CRM program?

Impact of CRM	How does your company measure the business performance due to the CRM program? What are the positive consequences of the CRM adoption? What is the effect of CRM adoption on the customer satisfaction? Is there any relationship between CRM program and employee satisfaction?

APPENDIX 4.2 : SUMMARY OF INTERVIEWS

Summary of the 1ˢᵗ exploratory interview

Date: 17ᵗʰ Jan 05

Time: 5:00pm-6:15pm

Venue, CityU P7711

Respondent: Vivien Chow, Director of Group Marketing

　　　　　　　Miramar Group (over 16 years marketing experience)

She was one of the important persons who initiated the implementation of CRM in the corporation

Industry to be focused on in the interview: Hospitality

a. Development of Marketing in the company

- "Our corporation started in the 1950s; at first, it did not have a Marketing Department - it was very sales oriented only. All the focus was just put on the sales. The room selling relied on the local travel agents. The food and beverage relied on advertisement programme."
- "Marketing strategy was developed in the company because the staff, like me, had strong marketing concepts and the corporation wanted to have a long-term relationship with customers."
- "Our corporation has developed direct marketing and then a loyalty programme before adopting CRM."

b. Meaning of CRM to the company

- "We think that the most important component of CRM is the customer information (no matter detail or not). Simple information may include name, addresses, telephone and email. Extensive information may include customers' preferences, their family information, their profile and their spending pattern. The information will then be processed through systematic and technological supporting devices to understand our customers in a timely way. Through this channel, the company can reach the customers or provide information to the customers in order to increase sales."
- "CRM has a function in assisting other marketing programmes, like promotion and PR. Follow-up calls or emails will be used in further contacting the customers for sales."

- *c. Ways to implement CRM*
- "Forms were designed to collect customers' information….Name cards were also collected in order to get customers' information at a later stage."
- "A CIS system was used to process the information in the company. The MIS team of our corporation developed and maintained the system."
- "The information in the database can be shared among different areas of work in the corporation."
- "At first, the database only contained the VIP customers (2,000 to 3,000 members), now we have more."

d. Factors affecting the adoption of CRM
- "There was a market trend and more academic papers discussed this issue. We wanted to keep the market pulse, therefore, we moved on to develop the CRM…..Moreover, as the means of communication changed, direct marketing became not fast enough and was more expensive than sending emails."
- "In addition, our corporation thinks that it is important to understand the needs of customers."
- "Attitude and support of top management was very important for our corporation to adopt CRM…..we have to persuade them to approve the change to CRM, therefore, if they do not support, nothing can be changed."
- "Investment cost is an essential factor in determining whether the organisation will adopt CRM. Cost includes incentives in getting customers' contact information, training of staff, system setup and maintenance."
- "When the customers have stronger relationship with our organisation, they will decide to come to our company whenever they want to go to a hotel. With CRM, we can be more active in building relationships with customers by sending updated information or promotions to them."

e. Impact of CRM adoption
- "Our company likes to focus on the controllable and measurable effects more…..Cost effectiveness and cost justification are very important in assessing whether CRM should be implemented. Sales regarding the CIS database were measured separately in order to measure the effectiveness of the CRM programme. Return on investment and profit and loss are

important measures for our company to assess whether CRM is effective."

- "Ratios like spending of customers from CIS database over total sales were measured to assess the effectiveness of CRM."
- "Increase in customers' return frequency and referral letters as well as decrease in complaints indicated the effectiveness of CRM."
- "CRM was integrated with other marketing programmes in our company. In general, it was difficult to single out the effect only from CRM."

f. Difficulties

- "Front-line staff felt very troubled at the beginning of the CRM implementation."
- "We had to organise briefing and training to the staff in order to explain the objectives and advantages of CRM."
- "It is very difficult for the hotel industry to get information on customers. Our nature is different from banks to which customers are more willing to disclose their personal information."
- "Organisational culture was very important; it is difficult to make sure the entire organisation believed the expected benefits of CRM."
- "Operational issues like standardisation of the records to be input in the database was also challenging for practising CRM. It required the cooperation of staff from marketing, MIS and operations departments."

Summary of the 2nd exploratory interview

Date: 2nd Jan 2005
Time: 12:15pm-1:00pm
Venue: Citibank

Respondent: Nicola Stuckey, Vice president
                      Database Marketing and Analysis
(She has over 6 years of experience in customer relationship management)

Area to be focused: Consumer group

a.   *Marketing history of the company*
- "Our department started to develop in Asia four years ago. In the past, the marketing communication was just focused on promotion like advertisement. One-to-one marketing has been developed before also."
- "However, in order for a company to survive nowadays, it is very important to understand the customers, manage individuals, build up a loyal relationship with customers, know how to serve customers better in response to their needs and differentiate yourself with competitors. As a result, CRM is emphasised."

b.   *Meaning of CRM in the company*
- "We try to be a customer centric organisation, CRM strategy was adopted to make customers happy and have a customer value focus. Technology is important, but the company has to make decisions in understanding what the customers want to experience at the end of the day. Therefore, technology is just a tool rather than the focus of CRM."
- "CRM helps the company use the information stored in the database more effectively and it can help the company to sell the suitable products to target customers at the right time."

c.   *Ways of implementing CRM*
- "We have in-house intensive data analysis rewrite on the SAS platform. We don't have any specific CRM solution."

d.   *Factors affecting the adoption of CRM*

- "…..attitude of management level is very important for our company to adopt CRM. They decided to invest a lot on the frontline and even changed some objectives for meeting the goals."
- "It is very expensive to acquire new customers, so it will be much better for company to retain and build loyalty with customers and keep a good relationship with them in order to improve profits."
- "I think we are quite ahead of the game (competition) in this industry, we have a well built database warehouse to store our data for access and many competitors do not have that ability so it makes us adopt CRM easier."
- "In order to be competitive, companies do not want to target customers wrongly and they know that the individual needs of customers are very important, therefore, they develop CRM."
- "Company culture and company values are very important determinants for my company to adopt CRM…I think the whole company values customer relationship."

e. *Impacts of CRM*

- "In order to measure the impacts of CRM, we have many different measures in terms of financials, risk and customer satisfaction."
- "The regular customer satisfaction survey about overall relationship with the bank allows us to measure the effect as well as to benchmark from competitors."
- "We measure customer satisfaction campaign by campaign, for example customer centric campaign and marketing push campaign."
- "Financial ratios and response rates can tell us whether the company has targeted the customers correctly."
- "The effects of CRM may be reflected by the general employee survey."

f. *Difficulty in adopting CRM*

- "The ideas of CRM are very easy, but the logistics can be very difficult."
- "It has to change the staff's thinking to focusing on customer relationship rather than product."
- "……Organisational structure can make it difficult."

g. *Database marketing vs CRM*

- "Database marketing maybe the same as CRM, the difference is how you use that data most effectively…..Good analysis could have told you who the right people to be targeted are. It's more a term on how to manage

priority. Prioritisation will be the great challenge between database marketing and CRM."

- "If you have one product, database marketing can help. However, if you have many products, it will be difficult to know which one you should offer to the customers. These are analytically driven problems. I think CRM is an extension of database marketing."

Summary of the 3rd interview

Date: 2nd Feb 2005
Time: 3:00pm-4:00pm
Venue: Sunday Telecom

Respondent: Melissa H.Y. Hang, CRM Manager
                     Sunday Telecom

(She has more than 3 years experience in customer relationship management experience)

a. *Development of marketing strategy*

- "Our company has been set up in the market for 8 years. Since there were only GSM mobile operators in the market at that moment, therefore, we entered the market as a new company by providing PCS network. As a new company, we focused a lot on acquisition, pricing and brand building strategies in order to make sure we could have certain penetration at that time."

- "After the government allowed people to carry their mobile numbers to different operators, we had a lot of brand building and print advertisement campaigns in order to encourage people to change their mobile numbers to our company."

- "In the first few, 3-5 years, we put a lot of effort into brand building to find our market positioning and we positioned ourselves as new and creative brand. Therefore, our target customers are also young and energetic people."

- "After a few years, we had 600-700k customers. We started to find out that retaining customers is very important. Moreover, as there are 6 players in the market, the acquisition of customers will not increase too much. In this situation, in order to gain profits, it will be important for us to retain our customers."

- "4 years ago, we started to focus on customer retention. Numbers of years stayed in our company and average avenue per user are the important profit indicators in our industry. As a result, churn rate (number of people left the company / total number of customers) is measured. We had tried to reduce the monthly fee or provide more free minutes to the customers in order to make them stay longer."

- "However, we found that pricing strategy only is not effective in retaining the customers in the company. As a result, we have set up a loyalty programme-loyalty club."
- "The loyalty club serves the customers of different groups based on their spending. Personalised services and package (e.g. mobile discount, special rate, IDD package) are provided to them according to their spending class."
- "Our communication channels are print advertisements, SMS, call centre, telemarketing. We will think about how we can build a relationship with the customers through these channels."
- "A time table will be set in welcoming the customers, selling products and caring for the customers."
- "We will also segment the customers according to their usage, age, profile and contribution (customer value). For example, for youths, we will make special night free talking plans (unlimited night time call); for business people, we will make a travel/ IDD related package."

b. *Definition of CRM*
- "We think CRM can help us to retain the customers and target the customers correctly in order to gain profits. CRM can allow the company to use money effectively by targeting suitable customers for the right products. It will also increase the word of mouth so that more customers will stay with the company."
- "CRM is another marketing approach which can help the company achieve business targets. Since we are a service industry which is different from FMCG, therefore customers are our assets. The approach in retaining customers becomes very important. We should use the information in our database effectively to retain the customers."

c. *Ways of implementing CRM*
- "We write programs ourselves to analyse the customer data. We will also use many alternative cheaper ways to get the information that we need from the database."
- "SAS or other sophisticated software maybe important, however, they are very expensive as an investment."

d. *Factors affecting the adoption of CRM*
- "We found that revenue decreased because of customers leaving. Therefore, in order to increase the retention rate, we set up CRM 3 years ago. We expected the churn rate to decrease after the adoption of CRM."

- "We want to satisfy the customers by adopting CRM so that customers feel that we know their needs."
- "We expected a revenue increase after the adoption of CRM also."
- "Our organisation structure moved towards CRM approach as we have a separate customer relationship management team for retaining customers, marketing planning team for carrying our data analysis and model building."
- "Internal posters about why and how to carry out CRM has been practiced for a long time. Every member of staff in the company knows what CRM is. Therefore, support from management is important."

e. *Impact of CRM*
- "Response rate of the call centre."
- "A Customer Satisfaction Survey will be conducted each month for measuring customer satisfaction about hotline services, sales services."
- "Trend of the churn rate was also measured."
- "Retention rate, average spending and satisfaction of the customers in the loyalty club database will be measured each year."

f. *Difficulty in implementing CRM*
- "Customers are becoming more demanding nowadays. It will be very challenging in managing customers' expectation."
- "Competition is very strong. The way to differentiate ourselves is very difficult."

CRM adoption
- "We would like to use more sophisticated technology and also acknowledge the things that we need for CRM. However, these aspects will not be the first priority of the company's investment. We may need to invest more on some new mobile technology such as the 3G network."

Summary of the 4th exploratory interview

Date: 25th   Feb 2005
Time: 1:30pm-2:30pm
Venue: CityU

Respondent: Teresa Ho, Brand Manager
                      Guerlain

a.   *Marketing history of the company*

- "Guerlain has been set up in Hong Kong for more than 10 years. We have 16 administrative staff and 70 frontline staff in the Hong Kong office. The business started with booths in departmental stores and facial salons. The frontline staff did not keep any records of the customers at that time. After some time, the staff in the booths and facial salons started to remember the repurchase customers. Still, they did not do anything for maintaining customer relationship at that time, although they have kept a simple database of customers' information in the facial salon."
- "4 to 5 years ago, a loyalty club was set up. New customers can become ordinary member, repurchase customers can become VIP customers. News on new products or special promotions will be sent to the VIP customers."
- "Advertisement is mainly used for brand building. We want to keep close relationship with customers so we adopted CRM."

b.   *Meaning of CRM in the company*

- "We think CRM is to build relationships with customer. CRM needs a lot of support including technology support and human resources support. Data analysis is very important to segment the customers and keep track the behaviour of the customers."

c.   *Ways of implementing CRM*

- "There are a lot of companies providing data mining support to companies. We outsource the data mining and data analysis work to a consulting company. We give our analysis objectives to the consulting company each month, they will then provide us with the results that we want."
- "The consulting company developed the program by themselves. They always tailor-make the solutions for different customers."

d. Factors affecting the adoption of CRM

- "Market trend is the most important driver which makes us adopt CRM. We know that a lot of cosmetics companies are doing CRM in Hong Kong. Therefore, it is essential for us to adopt CRM in order to compete with competitors in order to keep our customers."

- "CRM was adopted as our company is market oriented and customer oriented. In other words, market trends and customers' needs are important to us. Many companies in this industry care about their customers. In addition, customers require more information from us. Therefore, by adopting CRM, we can send more information to the VIP customers actively to target customers and make them feel our company care about them and remember them."

- "We want to increase the loyalty of the customers. We think that knowing customers' needs becomes the basic marketing needs."

- "Management supported CRM strategy totally. CRM wastes time and money and it is difficult to see the immediate effect. However, management still supported because they know it is important."

e. Impacts of CRM

- "We will measure the return rate of the customers. Especially, when we have new products, we will measure the response rate of the customers after we have sent out the news to them."

- "We will also check the percentage of sales from VIP members. This can represent the successful rate of the CRM programme."

- "Moreover, revenue from VIP is measured every half year and whole year. We think that when the percentage of sales from VIP members is higher, our CRM is doing better."

- "The feedback from customers will also be used to assess the effect of CRM. VIP customers usually call our office to express their opinions."

f. Difficulty in adopting CRM

- "The difficult period happened during the transition period. After adopting CRM, some policies to customers have been changed compared to the stage before CRM adoption, it led to more customer complaints. Frontline staff have to know how to handle complaints well."

- "Job satisfaction of employees increased as more customers returned. The frontline staff can also earn more as they are paid with commission."

- "Training is organised for the staff to let them know the procedures related to CRM (e.g. handling customers' complaints, operational issues, etc.) therefore, there is not much difficulty in the implementation."

Summary of the 5th exploratory interview

Date: 17th March 2005

Time: 3:00pm-4:00pm

Venue: Wing Lung Bank

Respondent: Chi-Ming Kung, Deposits Department, Sub-Manager

Wing Lung Bank

a.   *Marketing history of the company*

- "Our marketing strategy was very traditional and we have been low profile for a long time. Our customer source was mainly from word of mouth. Many generations of the same family may also be our customers."
- "10 years ago, we became more active and launched some advertisements on radio and TV for different products."
- "The management has not been very keen on the change to CRM before. Therefore, we followed the leader in the industry, changed our platform (e.g. storing financial transactions of deposit and fixed-deposit etc.) and set up the CRM system which was bought from IBM 3 years ago.
- "We have 70 years' history and 34 branches now in Hong Kong."

b.   *Meaning of CRM in the company*

- "Customer relationship management emphasised repeat purchases, keeping long-term relationships with customers, caring customers, and knowing their needs. We can cross-sell different products to the customers by adopting CRM for segmentation in order to increase profits. It must require the help of IT."
- "We need to analyse the value of the customers of our company by using profit analysis."
- "We are at the beginning of the CRM practice, the formal setup of the whole CRM system is just 1 year."

c.   *Ways of implementing CRM*

- "We bought the CRM technology from IBM. They helped us to create a user friendly program which can allow us to specify the product rule in order for us to select some target customers for sales."

"Stronger analysis software like SAS may be bought at a later stage."

d.   *Factors affecting the adoption of CRM*

- "We think about CRM because we find that it is very difficult to operate because of the strong competition of this industry. Moreover, we found that the cost of keeping low profit customers is very high. Therefore, we have to think about how to keep profitable customers."
- "Since the leader in this industry like Standard Chartered Bank has set up CRM for keeping customers, we would also like to follow in order to see if we can maintain our customers."
- "Customer needs for different assets, planning products and the variety make us adopt CRM so that we can try to analyse and know their needs."
- "With CRM, we can analyse the background of the customers together with their requirements."
- "We are aware of the development of IT, which can help us to search for information more efficiently. Therefore, we plan to adopt CRM."
- "Management also supports the change and adoption of CRM. They expect the sales can be increased after adopting CRM."

e. *Impacts of CRM*

- "It will be very difficult for us to single out the effect due to CRM. We will try to assess the successful rate of phone sales to the customers in the database. The success of CRM is highly dependent on the product nature, it may not be directly related to the CRM (e.g. interest rate)."
- "We measure the return of the customers and see if it meets the expected quota."

f. *Difficulty in adopting CRM*

- "We find that the most difficult part of implementing CRM is updating our data. Since our company has been set up for many years, and we did not collect enough data in the past when the customers bought our products. Therefore, it will take a lot of time for us to update the customers' information."
- "Moreover, the information of customers changes very fast. We need to put a lot of effort in order to keep it update."
- "In addition, there is also difficulty in integrating the data collected from different departments. Since different departments may contain the information of a same customer when the customer purchases different products, therefore, we have to choose the most accurate data for storage and use."

- "Staff felt very frustrated at the beginning of CRM adoption in getting so much information from customers. We have organised training for them to teach them the skills."

Summary of the 6th exploratory interview

Date: 18th March 2005
Time: 12:00pm-1:00pm
Venue: Sincere head office

Respondent: Lilian Cheung, Senior Marketing Executive
                    The Sinere Company Limited (Department Store)

a.   *Marketing history of the company*
- "Our marketing strategies include advertising (above the line strategy), public relation (independent company to coordinate with the press) and VIP program (it is major part of our CRM program)."
- "Our VIP program has been set up over 10 years. We have 0.12million of VIP customers in our database. We think our VIP customers are very important, their revenue is 50% of our total sales in a year."
- "Our strategy is to maintain the existing customers and keep on recruiting new customers."

b.   *Meaning of CRM in the company*
- "CRM is not just the job of marketing or VIP program. We want to give satisfactory services and shopping environment to the customers (not only the VIP customers). We want to satisfy all customers and want them to feel a consistent good feeling towards the company."
- "IT within CRM is important because it helps us to enter the information of the customers. It can allow us to draw the customer information for direct mailing or analysis."

c.   *Ways of implementing CRM*
- "Customers who spend over HK$1,000 can join our VIP programme."
- "We will categorise the customers into active and inactive customers. We send sales information or newsletter only to the active customers in order to minimise the wastage. The response rate is around 12% to 15% which is quite high."
- "Special programmes like the stamp campaign are used. They can accumulate stamps whenever they spend HK$300. After collecting 15 stamps, they can have HK$100 cash coupon. We are still planning other programmes to the heavy buyers."

- "POS system was bought for use as the system of our CRM program. Our MIS department will help us to select target customers for different promotion events."

d. *Factors affecting the adoption of CRM*

- "Our management thinks that the customers who buy from our store repeatedly are very important. Before the CRM, we had already got a fixed base of loyal customers. Our management wants to keep a close relationship with the customers and know that they are valuable to the company. They want them to enjoy some benefits which ordinary customers cannot enjoy."
- "Our management knows that the loyal customers contribute a lot to the total sales. We want to put more resources on them."
- "In the past, loyal customers simply show their member cards in order to have their benefits. Because of the advances of technology, there was a change in the VIP program around 5 years ago, information of customers can be stored and analysed more systematically nowadays by applying a barcode in the membership card."
- "Management is very concerned about the VIP program and has confidence in the growth of sales from the customers. They will keep track of the VIP sales data."
- "Our CRM programme is in a developing stage compared to other competitors."
- "Staff are clear about the objectives of the CRM programme in the company."

e. *Impacts of CRM*

- "We will measure the sales figure of a specific promotion campaign of the VIP customers. We will compare the spending with the sales figures."
- "We also compare the growth of the spending of the VIP customers with a similar promotion campaign last year."
- "We sometimes conducted a survey to collect opinions from the VIP customers. There is a very simple survey behind the stamp collecting card also."

f. *Difficulty in adopting CRM*

- "It is difficult to balance the budget and the benefits of the customers."

- "Customer service staff in different branches will get training about the CRM programme details. There will be a briefing for each individual ad hoc promotion."

Summary of the 7th exploratory interview

Date: 22nd March 2005
Time: 5:00pm-6:00pm
Venue: MRM Partners

Respondent: Henrik Monefeldt, Managing Director
              MRM Partners
(Consulting company of the Asia Miles programme for Cathy Pacific Airline (CX))

a.   *Loyalty strategy of CX*
- "CX runs two loyalty programmes, Asia Miles and the club. Before the launch of Asia Miles, CX had a Frequent Flyer Programme (FFP)."
- "Asia Miles is an FFP where you earn miles towards free flights, upgrades, companion tickets and more by using the services of partners in the programmes, air and non-air. There are no tiers or benefit structure. Asia Miles is separately branded and is not explicitly linked to CX − unique for the industry. It was started in 1999."
- "The Club is a 35+ years loyalty club under the CX brand umbrella providing CX frequent flyers with special service benefits and privileges such as lounge access, excess baggage, priority check-in and baggage handling, etc. The Club has 5 tiers, of which 4 are elite tiers. Key recruitment pool for The Club is Asia Miles."
- "Database was kept and handled by CX."

b.   *Meaning of CRM in CX*
- "We think CRM is a means of generating additional revenue from your existing client database. There are two sides of CRM, one is called acquisition, that is where you put a message saying this is who we are and asking customers to come. For example, telecom company attracted people by using pricing strategy, then they started to have customers' database (one-time customers, loyal customers, good customers, bad customers). [CRM therefore is about slicing and dicing your database into segments and clusters (customers with similar characteristics). For the airline, one cluster may be Chinese living overseas."
- "There is a technology aspect to that. We know our customers, we don't treat all customers in the same way, because different customers are very different. Therefore, they get different communications and different offers

at different times. It is difficult to manage and complex. It takes time and patience and is expensive. If you do it well and right, it can give you a lot of return."

- "What it is all about is attaching lifetime value to each individual in your database. The company should put emphasis on the lifetime value and not the current contributions to the company. It is calculated by estimating the value of customers multiplied by the active lifetime in different cluster."

- "We found 12 clusters in CX's case. For example, the managing director or business owner; high flying foreigner; students."

- "For me, I think more high end products and more pricey stuff like cars, air travel, phone company, bank, insurance, technology company and magazines should adopt CRM."

c. *Factors affecting the adoption of CRM in CX*

- "CX can make money after adopting CRM. Nearly every airline has got a loyalty programme, competition is one of the factors."

- "Where it makes financial sense to establish an ongoing relationship with individual customers, we should do it."

- "People's attitude is very important, if people are willing to change, it will make CRM easier."

- "HK has undergone economic problems, therefore, many companies focus on short profit at this moment."

d. *Impacts of CRM*

- "Track the transactions of the customers in the database. We compare the revenue from the customers in year 2004 with year 2003 and so on."

- "If the return is larger than the expense, then we are doing something right."

e. *Difficulty in adopting CRM*

- "CX does a lot of customer satisfaction surveys with its customers. They do in-flight surveys and face-to-face interviews. They will then use their opinions to improve the CRM programme."

- "Staff normally think implementing CRM is trouble. They have 6,000 crew and 2,000 ground staff. All staff need to know the objectives of the Asia Miles. Therefore, it is very difficult. They will be given incentive programmes and training."

<u>Summary of the 8th exploratory interview</u>

Date: 20th March 2005
Time: 10:30am-11:30am
Venue: CityU
Respondent: Agnes Lung, Chief Communication Controller
                    Mabelle Diamond

a. *Marketing History of the company*
   - "Our company has been set up for 12 years. We have 0.3million customers' information. There are around 50,000 to 60,000 active customers in the database. We have 40-50 branches and 9 years marketing experience."
   - "We execute the CRM programme frequently. We always do direct mailings to customers and carry out data analysis."
   - "Our company has a history of being a distributor. The management at that time wanted to set up a retail diamond shop. We focused on special design jewelry by using small sized diamonds of high quality. At first, we started the marketing using advertisement. We also employed a consultant to train our frontline staff. Management was very concerned about repeat customers at that time. Therefore, we started CRM informally by just recording the information of the customers."
   - "CRM is important in our industry since reputation is important. In 2003, we launched an active CRM programme and would like to recruit more customers."
   - "We are a leader in adopting CRM in this industry. Many other diamond shops do not have CRM programme. We are quite mature compared to other companies in this industry."
   - "50% of our sales are from the customers in our database."

b. *Meaning of CRM in CX*
   - "Our CRM programme is initiated from the customer communication colleagues' point of view.   Branding strategy may conflict with our CRM strategy."
   - "CRM is a strategy which can retain loyal customers and is a way to increase the purchase frequency of the existing customers in order to make more profits."

c. *Ways in implementing CRM*

- "Customers can enter the club with spending over HK$1,000. They can then get 10% off when they purchase over HK$1,500. If the customers spend more than twice HK$1,500, they can get a HK$1,000 coupon."
- "Sometimes, we will even organise a travel tour by joining with a travel agent for our top VIP customers (customers with high purchasing power). We will also organise special events like mothers' day dinner for our customers."
- "We will divide the customers into 3 levels: customers with high, medium and low purchasing power."
- "We will send greetings to customers on their birthdays and wedding anniversaries by email and SMS in order to save the cost. We will also send a newsletter to the customers whenever there is new product launch."
- "We have an IT department in our company. We bought software from a consulting company and modified it by ourselves according to our requirements. We use IRMS – Interactive retail management system in order to enter the customers' information and customers can also use this system to view different designs of the diamonds and make an order."

d. *Factors affecting the adoption of CRM*

- "Repeat customers are very important to our industry. It is cheaper to ask the existing customers to purchase repeatedly than to acquire new customers."
- "Attitude of top management is very important. They wanted to adopt CRM at the beginning."

"There is strong sense of CRM in the organisational culture. The staff understand the objectives and the benefits of CRM, therefore, they strongly support the programme."

Impacts of CRM

- "It is difficult to measure the direct effect of CRM. However, we will try to see the effect of CRM by checking their spending and the repeat purchase frequency."
- "Regular customer survey is always conducted for checking customers' satisfaction."

"Through the CRM programme, frontline staff feel that they can have more tools to communicate with the customers, so that they can promote more to the customers and achieve more commission."

Difficulty in adopting CRM

- "Communication with staff is very important. The staff has to know the details of the CRM programme and the problems which may occur during the execution."
- "It is very difficult to balance customers' benefits and the company's benefits."

APPENDIX 5.1 : COVER LETTER

The University of Nottingham

April 9, 2006

Dear Sir/Madam,

Re: Customer Relationship Management (CRM) Survey

I am a PhD student of University of Nottingham and I am also a Statistical Consultant in City University of Hong Kong. I am writing to request for your help by performing a survey in the area of CRM. Your kind support in this area would help researchers in my University tap into the unknown knowledge that lies behind the philosophy of CRM. Your response would be instrumental in helping the industry to understand how CRM is actually taking its shape in real life.

In the recent years, the adoption of CRM has evolved to be very common in the organizations in service industry in Hong Kong. In order to understand the attitudes towards CRM and the impact of CRM, I, along with my Supervisor, Prof Christine Ennew (Dean of Faculty of Law and Social Sciences) would like to conduct the captioned research.

After discussing with a number of companies in the service industry in Hong Kong, we have compiled a questionnaire to understand your perspectives about the drivers of CRM adoption and its impact on organizational performance. The enclosed questionnaire is being circulated to a sample of organizations in service industry, selected randomly from a database. **Regardless of whether your company is an adopter of CRM**, your answers are very important to the accuracy of the survey. It will only take 15 minutes to complete the questionnaire (either in English or Chinese). You may then proceed and return it in the pre-paid postage return envelope before 31st May 2006.

After you have filled in the questionnaire, a report on this topic can be sent to you as a token of appreciation in return of your valuable contribution. The information you provide will be treated with utmost confidentiality. If you are interested in receiving a report on the findings of this research, please write your name and company address at the end of the questionnaire. This information will only be used to send you a copy of the results. If you require further assistance or advice in completing the questionnaire, please do not hesitate to contact me at lixkya11@nottingham.ac.uk or on (852) 2788 8322. Thank you very much for your help.

Yours sincerely,

Miss Agnes, Ka Yee Law   Prof Christine Ennew

PhD Student   Supervisor and Dean of Law and Social Sciences

University of Nottingham,   University of Nottingham,

United Kingdom   United Kingdom

APPENDIX 5.2 : FINAL QUESTIONNAIRE (ENGLISH VERSION)

Completed questionnaire, please mail using the return envelop provided.

Survey on CRM usage and its impact on organizational performance

Aims: **To find out the attitudes towards Customer Relationship Management (CRM) and the impact of CRM on organizational performance.**

Confidentiality: **The data collected will ONLY be used for academic research purpose and the results obtained will be displayed in aggregated form in any publications. The original survey forms will be physically erased 6 months after the publication of the final report.**

Answer the questions below as specify, otherwise please tick/circle one box for the most suitable answer. Remembering that there are no right or wrong answers.

Part I. Use of CRM strategy

CRM is an integrated tactics and technologies for managing the relationships with potential and current customers as well as business partners across marketing sales and service regardless of the communication channel.

1. Please indicate the distribution of B2C and B2B business in your organization. B2C: Business to Customer B2B: Business to Business	B2C _____% (if > 0%, please fill in the rest of the questions <u>based on the retail market</u>) B2B _____% (if =100%, please fill in the rest of the questions <u>based on business customers</u>.)
2. Is your company using CRM?	☐ 1.Yes *(please go to question 4)* ☐ 2.No *(please go to question 3)*
3. Will your company use CRM in the future 12 months?	☐ 1. Definitely will ☐ 2. Will ☐ 3. Not sure ☐ 4. Will not ☐ 5. Definitely will not *(please go to question 5)*
4. How long has your company been using CRM?	☐ 1. less than 1 year ☐ 2. 1-2 years ☐ 3. 3-4 years ☐ 4. 4-5 years ☐ 5. 6-7 years ☐ 6. 8-9 years ☐ 7. 10 or above *(please go to question 5)*

5. On a scale of 1 to 5, please indicate your level of agreement to the following statements.	Agreement level SD ←————→ SA				
	1	2	3	4	5
i. Through ongoing dialogue, we work with individual key customers to customize our offerings.	1	2	3	4	5
ii. My organization provides customized services and products to our key customers.	1	2	3	4	5
iii. My organization makes an effort to find out what our key customer needs.	1	2	3	4	5
iv. When my organization finds that customers would like to modify a product/service, the departments involved make coordinated efforts to do.	1	2	3	4	5
v. My organization has the sales and marketing expertise and resources to succeed in CRM.	1	2	3	4	5
vi. Our employee training programs are designed to develop the skills required for acquiring and deepening customer relationships.	1	2	3	4	5
vii. My organization has established clear business goals related to customer acquisition, development, retention and reactivation.	1	2	3	4	5
viii. Employee performance is measured and rewarded based on meeting customer needs and on successfully serving the customers.	1	2	3	4	5
ix. Our organizational structure is meticulously designed around our customers.	1	2	3	4	5
x. My organization's employees are willing to help customers in a responsive manner.	1	2	3	4	5
xi. My organization fully understands the needs of our key customers via knowledge leaning.	1	2	3	4	5
xii. My organization provides channels to enable ongoing, two-way communication with our key customers and us.	1	2	3	4	5
xiii. Customers can expect prompt service from employees of my organization.	1	2	3	4	5
xiv. My organization has the right technical personnel to provide technical support for utilization of computer technology in building customer relationships.	1	2	3	4	5
xvi. My organization has the right software to serve our customers.	1	2	3	4	5

	Agreement level SD ← → SA				
	SD				SA
xvii. My organization has the right hardware to serve our customers.	1	2	3	4	5
xviii. Individual customer information is available at every point of contact.	1	2	3	4	5
xix. My organization maintains a comprehensive database of our customers.	1	2	3	4	5

Part II. Drivers of CRM adoption

Regardless of whether CRM is used in your company or not, we are interested in understanding your opinion related to CRM adoption. On a scale of 1 to 5, please indicate your level of agreement to the following statements.

	Agreement level SD ← → SA				
6. Customers' satisfaction is believed to be increased after the adoption of CRM.	1	2	3	4	5
7. Adoption of CRM can increase customers' repeat purchases	1	2	3	4	5
8. Adoption of CRM can increase average customers' life time value	1	2	3	4	5
9. Adoption of CRM can increase the return on investment (ROI)	1	2	3	4	5
10. CRM adoption can increase the profitability of our business	1	2	3	4	5
11. CRM fits our need in keeping relationship with customers.	1	2	3	4	5
12. The philosophy of CRM is consistent with our company value.	1	2	3	4	5
13. The practice of CRM is consistent with our usual practice.	1	2	3	4	5
14. The concept of CRM is easy to understand.	1	2	3	4	5
15. We find that it is difficult to put CRM into practice.	1	2	3	4	5
16. The CRM related IT support tools are difficult to use.	1	2	3	4	5
17. CRM can be tried with the available system in the market.	1	2	3	4	5
18. The practice of CRM is easy to be tested out.	1	2	3	4	5
19. I have seen other companies benefit from CRM.	1	2	3	4	5

Part III. Attitudes on strategy about customer relationship management

On a scale of 1 to 5, please indicate your level of agreement to the following statements.

	Agreement level SD ← → SA				
20. The newly developed data mining tool or programme helps to handle the customers' information more efficiently.	1	2	3	4	5
21. Data warehousing provides an opportunity for our company to search for important historical customers' information.	1	2	3	4	5
22. Advance in computer information systems can help to turn data of	1	2	3	4	5

customers into information for strategic business purposes.					
23. The development of communication systems (e.g. email, fax, mobile SMS and website) helps our organization communicate better across different departments and with customers.	1	2	3	4	5
24. In our industry, it is essential to keep good relationship with customers in order to be competitive.	1	2	3	4	5
25. Most of our competitors have adopted customer relationship management strategy and this makes us has no choice but choose it.	1	2	3	4	5
26. Competition in our industry is cutthroat.	1	2	3	4	5
27. There are many "promotion wars" in our industry.	1	2	3	4	5
28. Anything that one competitor can offer, others can match readily.	1	2	3	4	5
29. Our competitors are relatively weak.	1	2	3	4	5
30. Our organization wants to build close relationship with customers.	1	2	3	4	5
31. Customers value company with strategy to enhance intimacy with them.	1	2	3	4	5
32. More customers want personalized services in our industry.	1	2	3	4	5

Part IV. Drivers of CRM adoption (within organization)

On a scale of 1 to 5, please indicate your level of agreement to the following statements.

	Agreement level				
	SD	←	→		SA
33. Reform is beneficial to everyone in society.	1	2	3	4	5
34. Changes will bring vitality to our company.	1	2	3	4	5
35. The top management has full confidence in the change.	1	2	3	4	5
36. Top management has full support on practicing strategy in keep good relationship with customers.	1	2	3	4	5
37. In order to change for the better, senior management believes that good customer relationship is a necessity.	1	2	3	4	5
38. We constantly monitor our level of commitment and orientation to serving customers' needs.	1	2	3	4	5

	Agreement level				
	SD ← → SA				
	1	2	3	4	5
39. Our business objectives are driven primarily by customer satisfaction.	1	2	3	4	5
40. Our strategy for competitive advantage is based on our understanding of customer needs.	1	2	3	4	5
41. Our business strategies are driven by our beliefs about how we can create greater value for customers.	1	2	3	4	5
42. We measure customer satisfaction systemically and frequently.	1	2	3	4	5
43. We give close attention to after-sales service.	1	2	3	4	5
44. We rapidly respond to competitive actions that threaten us.	1	2	3	4	5
45. Our salespeople regularly share information within our organization concerning competitors' strategies.	1	2	3	4	5
46. Top management regularly discusses competitors' strengths and strategies.	1	2	3	4	5
47. We target customers where we have an opportunity for competitive advantage.	1	2	3	4	5
48. All of our business functions (e.g. marketing/sales, manufacturing, research and development) are integrated in serving the needs of our target markets.	1	2	3	4	5
49. All of our business functions and departments are responsive to each other's needs and requests.	1	2	3	4	5
50. Our top managers from every function regularly visit our current and prospective customers.	1	2	3	4	5
51. We freely communicate information about our successful and unsuccessful customer experiences across all business functions.	1	2	3	4	5
52. Our company pays close attention to innovation.	1	2	3	4	5
53. Our company emphasizes the need for innovation for development.	1	2	3	4	5
54. Our company promotes the need for development and utilization of new resources.	1	2	3	4	5
55. Our company tries to help employees understand what is happening in the company.	1	2	3	4	5
56. Our company gives employees opportunities to involve in the decision-making process.	1	2	3	4	5
57. Our company promotes unity and cooperation.	1	2	3	4	5

	Agreement level				
	SD	← →			SA
58. Our company tries to help employees understand the dynamics of the market situation.	1	2	3	4	5
59. The organizational group culture towards keeping good customer relationship is strong.	1	2	3	4	5

Part V. Information utilization

On a scale of 1 to 5, please indicate your level of agreement to the following statements.

	Agreement level				
	SD ← →				SA
60. We use customer information to develop customer profiles.	1	2	3	4	5
61. We use customer information to segment markets.	1	2	3	4	5
62. We use customer information to assess customer retention behavior.	1	2	3	4	5
63. We use customer information to identify appropriate channels to research customers.	1	2	3	4	5
64. We use customer information to customize our offers.	1	2	3	4	5
65. We use customer information to identify our best customers.	1	2	3	4	5
66. We use customer information to assess the lifetime value of our customers.	1	2	3	4	5

Part VI. Organizational performance

On a scale of 1 to 5, how would you rate the performance of your company relative to your major competitors across the following areas?

	Poor ← →				Ex
67. Customer satisfaction towards your organization	1	2	3	4	5
68. Customers' repeat purchases	1	2	3	4	5
69. Word of mouth of customers	1	2	3	4	5
70. Market share	1	2	3	4	5
71. Average customers' life time value	1	2	3	4	5
72. Return on investment	1	2	3	4	5
73. Overall performance of the business	1	2	3	4	5
	SD ← →				SA
74. Employees feel as though their future is intimately linked to that of this organization.	1	2	3	4	5
75. The bonds between this organization and its employees become stronger.	1	2	3	4	5
76. Employees are proud to work for this business unit	1	2	3	4	5

	SD ◄────► SA				
77. Our people have stronger commitment to this business unit.	1	2	3	4	5
78. Employees are fond of this business unit.	1	2	3	4	5

Part VII. Company Profile

79. Is your company an International company?	☐ Yes *(please go to Q80)* ☐ No *(please go to Q81)*
80. Where is the management decision of strategy implementation driven from?	☐ Hong Kong management ☐ Head office outside Hong Kong
81.Which industry does your company belong to?	☐1.Wholesale/Retail ☐ 2. Import/Export trade ☐3.Restaurants ☐ 4. Hotels ☐5.Transport ☐ 6. Communications ☐7.Banking ☐ 8. Financing (except banking) ☐9.Insurance ☐10. Business services ☐11.Others *(please specify):*_____
82. Number of Employees (in Hong Kong)	About_____people
83. How many years have your company been established?	_____ Years
84.Size of investment on CRM (Please state the range)	HK$_____ to HK$_____
85. Your job position	_____
86. Years of Working Experience in this company:	☐ <5 Years ☐ 5-10 Years ☐10-15 Years ☐ >15 Years

In order to thank you for your time, we would be happy to send you a complimentary copy of the result of this study to you. Please fill out the following information if you wish us to send you a copy.

Contact information

Company name:			
Company address:			
Contact person:			
Contact phone:		**Fax:**	
E-mail:			

The End

APPENDIX 5.3 : FINAL QUESTIONNAIRE (CHINESE VERSION)

問卷填妥後，請用附上的回郵信封寄回。

客戶關係管理運用和它對組織表現影響的調查

目的: 為了解對客戶關係管理的看法，以及客戶關係管理對公司表現的影響。

機密: 收集所得的資料只供學術研究用途使用，其所得結果將會以總數形式顯示出版。問卷的正本將會在最終報告刊登後 **6** 個月內清除。

請根據題目指示作答，否則請以✔號或圓圈標示最合適的答案。請注意，答案沒有對錯之分。

第一部. 客戶服務管理策略的運用

客戶服務管理把策略與科技二合為一，不論其溝通渠道，在市場推銷及服務方面管理公司與潛在客戶、現有客戶、生意伙伴的關係。

1. 請列出貴公司的 B2C 與 B2B 的業務分佈。 B2C: 企業對客戶 B2B: 企業對企業	B2C _____% （若>0%，請根據零售市場回答下列問題。） B2B _____% （若=100%，請根據企業客戶回答下列問題。）
2. 貴公司是否正在使用客戶服務管理?	☐ 1.是 *(請跳到問題 4)* ☐ 2.否 *(請跳到問題 3)*
3. 貴公司會否在未來 12 個月使用客戶服務管理?	☐ 1. 肯定會　　☐ 2. 會 ☐ 3. 不肯定　　☐ 4. 不會 ☐ 5. 肯定不會　　*(請跳到問題 5)*
4. 貴公司使用了客戶服務管理多久?	☐ 1.少於一年　☐ 2. 1-2 年 ☐ 3. 3-4 年　　☐ 4. 4-5 年 ☐ 5. 6-7 年　　☐ 6. 8-9 年 ☐ 7. 10 年或以上　　*(請跳往問題 5)*

5. 請從級別 1 至 5，指出您對下列句子的同意程度。	同意程度				
	十分不同意 ←———————→				十分同意
i. 我們通過與個別主要客戶持續對話，製造合符他們要求的商品。	1	2	3	4	5
ii. 我的公司為主要客戶提供合符他們要求的服務及商品。	1	2	3	4	5
iii. 我的公司致力尋找主要客戶的需要。	1	2	3	4	5
iv. 當我的公司發現客戶希望修改商品/服務時，各有關部門會加以協助。	1	2	3	4	5

。	同意程度				
	十分不同意 ←——→				十分同意
v. 我的公司擁有銷售、市場的專家和資源辦妥客戶關係管理。	1	2	3	4	5
vi. 我們的員工培訓課程會是針對訓練員工建立和加強客戶的關係而設計。	1	2	3	4	5
Vii. 我的公司就建立、發展、保留、重建客戶關係制定了清晰的商業目標。	1	2	3	4	5
viii. 員工的表現是以能否滿足客戶需要和成功接待客戶作衡量和獎賞的基準。	1	2	3	4	5
ix. 我們公司的結構是經過精心設計，圍繞我們的客戶群。	1	2	3	4	5
x. 我的公司的員工願意以積極的態度幫助客戶。	1	2	3	4	5
xi. 我的公司通過知識學習透徹了解主要客戶的需要。	1	2	3	4	5
xii..我的公司提供渠道讓我們和主要客戶進行持續的雙向溝通。	1	2	3	4	5
xiii. 客戶可期望我公司的員工提供快捷的服務。	1	2	3	4	5
xiv. 我的公司有適當的技術人員提供技術支援，利用電腦技術建立客戶關係。	1	2	3	4	5
xvi. 我的公司有適合的軟件服務我們的客戶。	1	2	3	4	5
xvii. 我的公司有適合的硬件服務我們的客戶。	1	2	3	4	5
xviii. 擁有個別客戶資料用作各方面的聯繫。	1	2	3	4	5
xix. 我的公司維持一個資料完善的客戶資料庫。	1	2	3	4	5

第二部.採用客戶管理服務的驅使因素

不論貴公司有否採用客戶關係管理，我們希望了解您對採用客戶關係管理的意見。請從級別 1 至 5，指出您對下列句子的同意程度。

	同意程度 十分不同意 ←→ 十分同意				
6. 採用客戶關係管理後，相信會提升客戶的滿意程度。	1	2	3	4	5
7. 採用客戶關係管理可以增加客戶的重複採購次數。	1	2	3	4	5
8. 採用客戶關係管理可以提高平均客戶終身價值。	1	2	3	4	5
9. 採用客戶關係管理可以增加投資回報。	1	2	3	4	5
10. 採用客戶關係管理可以增加我們的生意盈利能力。	1	2	3	4	5
11. 客戶關係管理適合我們維持客戶關係的需要。	1	2	3	4	5
12. 客戶關係管理的原理與我們公司的價值觀一致。	1	2	3	4	5
13. 客戶關係管理的做法與我們的慣常做法一致。	1	2	3	4	5
14. 客戶關係管理的概念不難理解。	1	2	3	4	5
15. 我們覺得很難實踐客戶關係管理。	1	2	3	4	5
16. 與客戶關係管理有關的資訊科技工具是很難應用的。	1	2	3	4	5
17. 客戶關係管理可以與現有的市場系統嘗試並用。	1	2	3	4	5
18. 測試客戶關係管理的應用很容易。	1	2	3	4	5
19. 我看過其他公司受惠於客戶關係管理。	1	2	3	4	5

第三部. 對客戶關係管理策略的看法

請從級別 1 至 5，指出您對下列句子的同意程度。

	同意程度 十分不同意 ←→ 十分同意				
20. 新研製的資料開採工具或程式有助客戶資料得到有效處理。	1	2	3	4	5
21. 資料儲存庫為我們公司提供一個搜尋過往重要客戶資料的機會。	1	2	3	4	5
22. 電腦資料系統的提升能有助把客戶資料轉化成為策略性商業用途的資料。	1	2	3	4	5
23. 溝通系統的發展(例如: 電郵、傳真、流動短訊、網業)有助我們公司與客戶以及公司內各部門之間更有效地溝通。	1	2	3	4	5
24. 要在我們的行業內維持競爭力，必須與客戶保持良好的關係。	1	2	3	4	5

	同意程度				
	十分不同意 ◄——► 十分同意				
25. 我們大部份的競爭者均有採用客戶管理策略，使我們在無可選擇之下選用它。	1	2	3	4	5
26. 我們行業的競爭十分激烈。	1	2	3	4	5
27. 我們的行業有許多「推銷戰」。	1	2	3	4	5
28. 任何商品只要一個競爭者能夠提供，其他競爭者便能夠立即配合。	1	2	3	4	5
29. 我們的競爭者相對上是較弱的。	1	2	3	4	5
30. 我們的公司希望與客戶建立緊密關係。	1	2	3	4	5
31. 客戶重視能夠策略性地與他們建立緊密關係的公司。	1	2	3	4	5
32. 愈來愈多客戶想要在我們的行業享受到個人化服務。	1	2	3	4	5

第四部. 採用客戶管理服務的驅使因素 (公司內)

請從級別 1 至 5，指出您對下列句子的同意程度。

	同意程度				
	十分不同意 ◄——► 十分同意				
33. 改革對社會上的每個人都有益處。	1	2	3	4	5
34. 改變會為我們的公司注入生氣。	1	2	3	4	5
35. 最高管理層對改變充滿信心。	1	2	3	4	5
36. 最高管理層全力支持實踐與客戶保持良好關係的策略。	1	2	3	4	5
37. 為了作出改善，高層相信良好的客戶關係是必須的。	1	2	3	4	5
38. 我們持續監管我們的承諾標準和方向以服務客戶的需要。	1	2	3	4	5
39. 我們的商業目標主要是受到客戶的滿足感所驅使。	1	2	3	4	5
40. 我們的競爭優勢策略是基於我們對客戶需要的了解而制定。	1	2	3	4	5
41. 我們的業務策略是以我們如何能為客戶創造更大價值的信念作為主導。	1	2	3	4	5
42. 我們經常有系統地評估客戶的滿意程度。	1	2	3	4	5
43. 我們十分重視售後服務。	1	2	3	4	5
44. 我們迅速回應威脅我們的競爭行動。	1	2	3	4	5
45. 我們的銷售員經常在我們公司內講解競爭者的策略。	1	2	3	4	5
46. 最高管理層定期商討競爭者的優點與策略。	1	2	3	4	5

		同意程度				
		十分不同意 ◄──► 十分同意				
47. 我們以我們有競爭優勢機會的客戶作為目標對象。	1	2	3	4	5
48. 我們結合所有商業功能(例如: 行銷/銷售、製造、研究和發展)，以滿足我們的目標市場需要。	1	2	3	4	5
49. 我們所有的商業功能和部門會回應彼此的需要和需求。	1	2	3	4	5
50. 我們各個功能的最高主管會定期探訪現有和未來的客戶。	1	2	3	4	5
51. 我們會橫跨所有商業功能，自由地交流我們成功和失敗的客戶經驗。	1	2	3	4	5
52. 我們的公司十分重視創新。	1	2	3	4	5
53. 我們的公司強調創新對發展的需要。	1	2	3	4	5
54. 我們的公司提倡發展和使用新資源的需要。	1	2	3	4	5
55. 我們的公司嘗試協助客戶了解公司的現況。	1	2	3	4	5
56. 我們的公司給予員工機會參與決策的過程。	1	2	3	4	5
57. 我們的公司提倡團結和合作。	1	2	3	4	5
58. 我們的公司嘗試幫助員工了解多變的市場情況。	1	2	3	4	5
59. 公司的團隊文化對於保持良好客戶關係的意識很強。	1	2	3	4	5

第五部. 資料使用

請從級別 1 至 5，指出您對下列句子的同意程度。

		同意程度				
		十分不同意 ◄──► 十分同意				
60. 我們利用客戶資料發展客戶檔案。	1	2	3	4	5
61. 我們利用客戶資料細分市場。	1	2	3	4	5
62. 我們利用客戶資料來評估客戶保持行為。	1	2	3	4	5
63 我們利用客戶資料找出合適的渠道來研究客戶。	1	2	3	4	5
64. 我們利用客戶資料來製造符合客戶需求的商品。	1	2	3	4	5
65. 我們利用客戶資料確認我們的最佳客戶。	1	2	3	4	5
66. 我們利用客戶資料評估我們的客戶終身價值。	1	2	3	4	5

第六部. 組織表現

和其他主要對手相較之下，從級別 1 至 5，您會如何就以下各領域評估貴公司的表現?

	強差人意 ←——→ 十分理想				
67. 客戶對貴公司的滿意程度	1	2	3	4	5
68. 客戶重複購買次數	1	2	3	4	5
69. 客戶的口碑	1	2	3	4	5
70. 市場佔有率	1	2	3	4	5
71. 平均客戶終身價值	1	2	3	4	5
72. 投資回報	1	2	3	4	5
73. 生意的整體表現	1	2	3	4	5
	十分不同意 ←——→ 十分同意				
74. 員工覺得他們的未來和這間公司的未來有緊密關係	1	2	3	4	5
75. 公司與員工之間的聯繫變得愈來愈強。	1	2	3	4	5
76. 員工對自己在這間公司工作引以為傲。	1	2	3	4	5
77. 我們的員工對這間公司有較強的責任感。	1	2	3	4	5
78. 員工喜歡這間公司。	1	2	3	4	5

第七部. 公司資料

79. 貴公司是否國際公司？	☐ 是 (請跳到問題 80)　　　☐ No (請跳到問題 81)
80. 策略執行的管理決定是由1何而來?	☐ 香港管理層　　　☐ 設於外地的總部
81. 貴公司是屬於哪個行業?	☐ 1. 批發/零售　　　☐ 2. 進/出口貿易 ☐ 3. 飲食業　　　☐ 4. 酒店 ☐ 5. 交通　　　☐ 6. 傳播 ☐ 7. 銀行　　　☐ 8. 金融(除銀行以外) ☐ 9. 保險　　　☐ 10.商業服務 ☐ 11. 其他(請註明):＿＿＿＿＿＿＿＿＿
82. 員工人數 (在香港)	大約＿＿＿＿＿＿＿＿＿＿＿人
83. 貴公司成立了多少年?	＿＿＿＿＿＿＿＿ 年
84. 客戶關係管理方面的投資金額 (請列出幅度)	港幣 $＿＿＿＿＿＿＿＿　 to　 港幣 $＿＿＿＿＿＿＿＿＿

85. 您的職位	_____
86. 您在這間公司的年資	☐ <5 年　　　☐ 5-10 年　　　☐ 10-15 年　　　☐ >15 年

為了答謝閣下所抽出的時間，我們很樂意把這項研究結果的副本寄給閣下作為答謝。如欲收到報告結果的副本，請填妥下列資料。

公司資料

公司名稱:	
公司地址:	
聯絡人:	
聯絡電話:	傳真：
電郵:	

全卷完

APPENDIX 6.1 : ASSUMPTION FOR REGRESSION MODEL

Plot of residuals vs predicted values
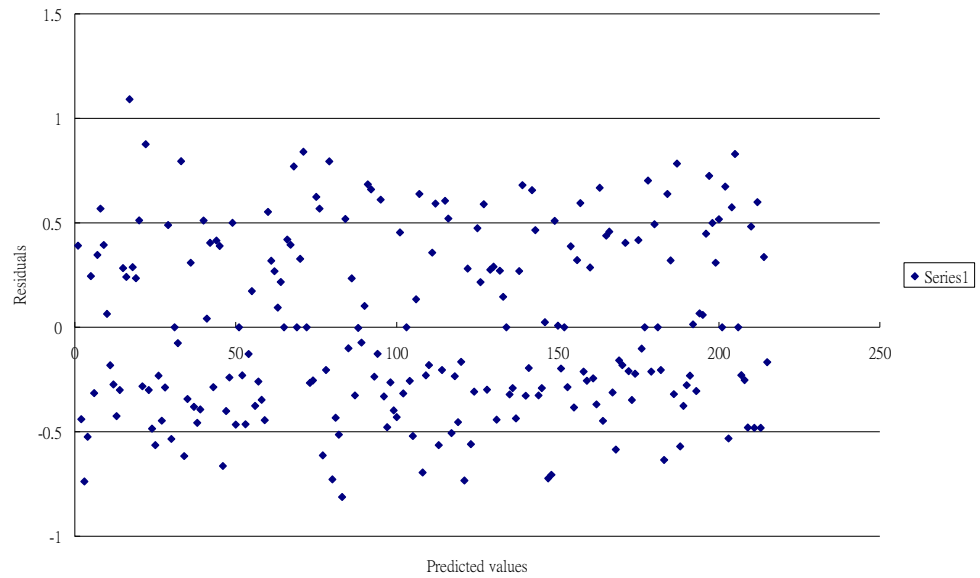
Normal probability plot

Normal Q-Q Plot of residual
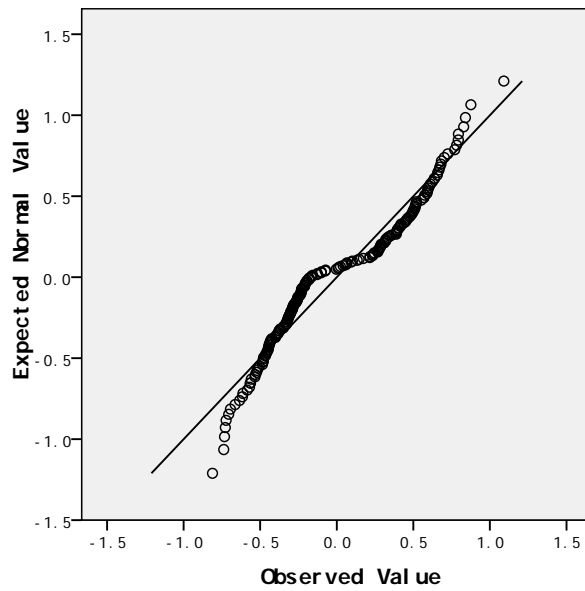
APPENDIX 6.2 : RELIABILITY RESULTS

CRM adoption

Item-Total Statistics

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Cronbach's Alpha if Item Deleted
Through ongoing dialogue, we work with individual key customers to customize our offerings.	61.40	104.624	.407	.913
My organization provides customized services and products to our key customers.	61.26	103.202	.512	.910
My organization makes an effort to find out what our key customer needs.	61.12	104.586	.515	.910
When my organization finds that customers would like to modify a product/service, the departments involved make coordinated efforts to do.	61.18	103.475	.528	.910
My organization has the sales and marketing expertise and resources to succeed in CRM.	61.88	101.331	.542	.910
Our employee training programs are designed to develop the skills required for acquiring and deepening customer relationships.	61.84	102.448	.488	.911
My organization has established clear business goals related to customer acquisition, development, retention and reactivation.	61.58	98.896	.737	.904
Employee performance is measured and rewarded based	61.64	102.325	.556	.909

on meeting customer needs and on successfully serving the customers.			
Our organizational structure is meticulously designed around our customers.	61.92	100.740	.645	.907
My organization's employees are willing to help customers in a responsive manner.	61.15	102.039	.661	.907
My organization fully understands the needs of our key customers via knowledge leaning.	61.54	100.691	.690	.906
My organization provides channels to enable ongoing, two-way communication with our key customers and us.	61.46	99.854	.672	.906
Customers can expect prompt service from employees of my organization.	61.12	102.109	.628	.907
My organization has the right technical personnel to provide technical support for utilization of computer technology in building customer relationships.	61.77	99.685	.629	.907
My organization has the right software to serve our customers.	61.81	100.865	.570	.909
My organization has the right hardware to serve our customers.	61.76	101.802	.578	.909
Individual customer information is available at every point of contact.	61.75	102.444	.542	.910
My organization maintains a comprehensive database of our customers.	61.58	101.683	.580	.909

Rogers' attributes of innovation

Item-Total Statistics

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Cronbach's Alpha if Item Deleted
Customers' satisfaction is believed to be increased after the adoption of CRM.	44.85	42.272	.675	.849
Adoption of CRM can increase customers' repeat purchases	45.00	42.075	.693	.848
Adoption of CRM can increase average customers' life time value	45.00	41.661	.726	.846
Adoption of CRM can increase the return on investment (ROI)	45.07	41.801	.664	.849
CRM adoption can increase the profitability of our business	45.04	42.342	.637	.851
CRM fits our need in keeping relationship with customers.	44.82	41.419	.722	.846
The philosophy of CRM is consistent with our company value.	45.00	41.407	.704	.847
The practice of CRM is consistent with our usual practice.	45.22	41.725	.700	.848
The concept of CRM is easy to understand.	45.25	42.260	.562	.855
We find that it is difficult to put CRM into practice.	45.85	50.039	-.089	.892
The CRM related IT support tools are difficult to use.	45.89	49.656	-.052	.886
CRM can be tried with the available system in the market.	45.44	43.857	.552	.856
The practice of CRM is easy to be tested out.	45.67	44.683	.437	.861
I have seen other companies benefit from CRM.	45.49	41.346	.585	.854

Perceived accessibility of IT solutions

Item-Total Statistics

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Cronbach's Alpha if Item Deleted
The newly developed data mining tool or programme helps to handle the customers' information more efficiently.	11.91	4.719	.614	.789
Data warehousing provides an opportunity for our company to search for important historical customers' information.	11.58	4.222	.641	.778
Advance in computer information systems can help to turn data of customers into information for strategic business purposes.	11.52	4.227	.734	.733
The development of communication systems (e.g. email, fax, mobile SMS and website) helps our organization communicate better across different departments and with customers.	11.34	4.509	.596	.797

Competition intensity

Item-Total Statistics

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Cronbach's Alpha if Item Deleted
In our industry, it is essential to keep good relationship with customers in order to be competitive.	17.30	46.658	.159	.624
Most of our competitors have adopted customer relationship management strategy and this makes us has no choice but choose it.	18.60	45.152	.234	.610
Competition in our industry is cutthroat.	17.63	46.009	.164	.622
There are many "promotion wars" in our industry.	17.73	14.027	.824	.255
Anything that one competitor can offer, others can match readily.	18.17	45.192	.231	.610
Our competitors are relatively weak.	18.96	22.974	.675	.372

Desire of customer intimacy

Item-Total Statistics

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Cronbach's Alpha if Item Deleted
Our organization wants to build close relationship with customers.	7.85	1.894	.429	.650
Customers value company with strategy to enhance intimacy with them.	8.21	1.524	.598	.425
More customers want personalized services in our industry.	8.21	1.683	.443	.640

Attitude towards change

Item-Total Statistics

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Cronbach's Alpha if Item Deleted
Reform is beneficial to everyone in society.	15.54	7.148	.559	.839
Changes will bring vitality to our company.	15.37	6.912	.716	.797
The top management has full confidence in the change.	15.58	6.775	.707	.798
Top management has full support on practicing strategy in keep good relationship with customers.	15.19	6.756	.666	.810
In order to change for the better, senior management believes that good customer relationship is a necessity.	14.91	7.190	.621	.821

Market orientation

Item-Total Statistics

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Cronbach's Alpha if Item Deleted
We constantly monitor our level of commitment and orientation to serving customers' needs.	46.53	62.162	.714	.904
Our business objectives are driven primarily by customer satisfaction.	46.65	63.687	.610	.908
Our strategy for competitive advantage is based on our understanding of customer needs.	46.59	63.388	.648	.907
Our business strategies are driven by our beliefs about how we can create greater value for customers.	46.65	63.898	.653	.907
We measure customer satisfaction systemically and frequently.	47.07	62.409	.612	.908
We give close attention to after-sales service.	46.74	61.521	.665	.906
We rapidly respond to competitive actions that threaten us.	46.79	63.641	.574	.909
Our salespeople regularly share information within our organization concerning competitors' strategies.	47.07	62.686	.639	.907
Top management regularly discusses competitors' strengths and strategies.	46.91	62.693	.618	.908
We target customers where we have an opportunity for competitive advantage.	46.73	62.788	.611	.908

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Cronbach's Alpha if Item Deleted
All of our business functions (e.g. marketing/sales, manufacturing, research and development) are integrated in serving the needs of our target markets.	46.81	61.618	.704	.905
All of our business functions and departments are responsive to each other's needs and requests.	46.91	62.510	.679	.906
Our top managers from every function regularly visit our current and prospective customers.	47.19	62.515	.536	.912
We freely communicate information about our successful and unsuccessful customer experiences across all business functions.	47.16	63.141	.546	.911

Innovation orientation

Item-Total Statistics

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Cronbach's Alpha if Item Deleted
Our company pays close attention to innovation.	7.09	2.828	.883	.846
Our company emphasizes the need for innovation for development.	7.03	2.839	.878	.850
Our company promotes the need for development and utilization of new resources.	6.99	3.286	.757	.947

Group culture

Item-Total Statistics

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Cronbach's Alpha if Item Deleted
Our company tries to help employees understand what is happening in the company.	14.78	8.753	.708	.873
Our company gives employees opportunities to involve in the decision-making process.	14.87	8.578	.740	.866
Our company promotes unity and cooperation.	14.46	8.538	.759	.862
Our company tries to help employees understand the dynamics of the market situation.	14.72	8.583	.763	.861
The organizational group culture towards keeping good customer relationship is strong.	14.57	8.815	.699	.875

Information utilization

Item-Total Statistics

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Cronbach's Alpha if Item Deleted
We use customer information to develop customer profiles.	20.89	22.877	.709	.927
We use customer information to segment markets.	21.03	21.665	.816	.917
We use customer information to assess customer retention behavior.	20.98	22.342	.836	.916
We use customer information to identify appropriate channels to research customers	21.11	22.186	.803	.918
We use customer information to customize our offers.	21.01	22.284	.739	.924
We use customer information to identify our best customers.	20.83	21.525	.774	.921
We use customer information to assess the lifetime value of our customers.	21.14	21.588	.785	.920

Customer satisfaction

Item-Total Statistics

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Cronbach's Alpha if Item Deleted
Customer satisfaction towards your organization	7.63	1.701	.706	.735
Customers' repeat purchases	7.56	1.751	.639	.799
Word of mouth of customers	7.48	1.558	.702	.739

Performance

Item-Total Statistics

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Cronbach's Alpha if Item Deleted
Market share	10.52	3.918	.609	.819
Average customers' life time value	10.31	4.174	.639	.805
Return on investment	10.38	3.653	.711	.773
Overall performance of the business	10.22	3.856	.717	.771

Employee satisfaction

Item-Total Statistics

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Cronbach's Alpha if Item Deleted
Employees feel as though their future is intimately linked to that of this organization.	13.75	9.562	.771	.935
The bonds between this organization and its employees become stronger.	13.76	9.004	.855	.920
Employees are proud to work for this business unit	13.84	9.202	.838	.923
Our people have stronger commitment to this business unit.	13.74	9.034	.832	.924
Employees are fond of this business unit.	13.79	9.004	.873	.916

APPENDIX 6.3 : VALIDITY RESULTS

CRM adoption – Key customers focus

Component Matrix(a)

Accounting for 65% of the variance

	Component
	1
Through ongoing dialogue, we work with individual key customers to customize our offerings.	.816
My organization provides customized services and products to our key customers.	.841
My organization makes an effort to find out what our key customer needs.	.806
When my organization finds that customers would like to modify a product/service, the departments involved make coordinated efforts to do.	.763

Extraction Method: Principal Component Analysis.

a   1 components extracted.

CRM adoption – CRM organization

Component Matrix(a)

Accounting for 58% of the variance

	Component
	1
My organization has the sales and marketing expertise and resources to succeed in CRM.	.767
Our employee training programs are designed to develop the skills required for acquiring and deepening customer relationships.	.730
My organization has established clear business goals related to customer acquisition, development, retention and reactivation.	.820
Employee performance is measured and rewarded based on meeting customer needs and on successfully serving the customers.	.703
Our organizational structure is meticulously designed around our customers.	.770

Extraction Method: Principal Component Analysis.

a   1 components extracted.

CRM adoption – Knowledge management

Component Matrix(a)

Accounting for 64% of the variance

	Component
	1
My organization's employees are willing to help customers in a responsive manner.	.826
My organization fully understands the needs of our key customers via knowledge leaning.	.796
My organization provides channels to enable ongoing, two-way communication with our key customers and us.	.805
Customers can expect prompt service from employees of my organization.	.759

Extraction Method: Principal Component Analysis.

a   1 components extracted.

CRM adoption – Technology based CRM

Component Matrix(a)

Accounting for 64% of the variance

	Component 1
My organization has the right technical personnel to provide technical support for utilization of computer technology in building customer relationships.	.802
My organization has the right software to serve our customers.	.843
My organization has the right hardware to serve our customers.	.821
Individual customer information is available at every point of contact.	.748
My organization maintains a comprehensive database of our customers.	.795

Extraction Method: Principal Component Analysis.

a 1 components extracted.

Relative advantage

Component Matrix(a)

Accounting for 67% of the variance

	Component
	1
Customers' satisfaction is believed to be increased after the adoption of CRM.	.795
Adoption of CRM can increase customers' repeat purchases	.841
Adoption of CRM can increase average customers' life time value	.838
Adoption of CRM can increase the return on investment (ROI)	.832
CRM adoption can increase the profitability of our business	.804

Extraction Method: Principal Component Analysis.

a   1 components extracted.

Compatibility

Component Matrix(a)

Accounting for 78% of the variance

	Component
	1
CRM fits our need in keeping relationship with customers.	.874
The philosophy of CRM is consistent with our company value.	.899
The practice of CRM is consistent with our usual practice.	.876

Extraction Method: Principal Component Analysis.

a   1 components extracted.

Complexity

Component Matrix(a)

Accounting for 55% of the variance

	Component
	1
The concept of CRM is easy to understand.	.645
We find that it is difficult to put CRM into practice.	.839
The CRM related IT support tools are difficult to use.	.858

Extraction Method: Principal Component Analysis.

a   1 components extracted.

Trialability

Component Matrix(a)

Accounting for 70% of the variance

	Component
	1
CRM can be tried with the available system in the market.	.839
The practice of CRM is easy to be tested out.	.839

Extraction Method: Principal Component Analysis.

a   1 components extracted.

Perceived accessibility of IT solutions

Component Matrix(a)

Accounting for 65% of the variance

	Component
	1
The newly developed data mining tool or programme helps to handle the customers' information more efficiently.	.783
Data warehousing provides an opportunity for our company to search for important historical customers' information.	.808
Advance in computer information systems can help to turn data of customers into information for strategic business purposes.	.867
The development of communication systems (e.g. email, fax, mobile SMS and website) helps our organization communicate better across different departments and with customers.	.773

Extraction Method: Principal Component Analysis.

a   1 components extracted.

Competition intensity

Component Matrix(a)

Accounting for 55% of the variance

	Component
	1
In our industry, it is essential to keep good relationship with customers in order to be competitive.	.686
Most of our competitors have adopted customer relationship management strategy and this makes us has no choice but choose it.	.668
Competition in our industry is cutthroat.	.632
There are many "promotion wars" in our industry.	.867
Anything that one competitor can offer, others can match readily.	.508
Our competitors are relatively weak.	.732

Extraction Method: Principal Component Analysis.

a   1 components extracted.

Desire of customer intimacy

Component Matrix(a)

Accounting for 61% of the variance

	Component
	1
Our organization wants to build close relationship with customers.	.735
Customers value company with strategy to enhance intimacy with them.	.855
More customers want personalized services in our industry.	.743

Extraction Method: Principal Component Analysis.

a   1 components extracted.

Attitude towards change

Component Matrix(a)

Accounting for 62% of the variance

	Component
	1
Reform is beneficial to everyone in society.	.712
Changes will bring vitality to our company.	.830
The top management has full confidence in the change.	.829
Top management has full support on practicing strategy in keep good relationship with customers.	.800
In order to change for the better, senior management believes that good customer relationship is a necessity.	.763

Extraction Method: Principal Component Analysis.

a   1 components extracted.

Market orientation- Customer orientation

Component Matrix(a)

Accounting for 62% of the variance

	Component
	1
We constantly monitor our level of commitment and orientation to serving customers' needs.	.810
Our business objectives are driven primarily by customer satisfaction.	.786
Our strategy for competitive advantage is based on our understanding of customer needs.	.821
Our business strategies are driven by our beliefs about how we can create greater value for customers.	.821
We measure customer satisfaction systemically and frequently.	.734
We give close attention to after-sales service.	.739

Extraction Method: Principal Component Analysis.

a   1 components extracted.

Competition orientation

Component Matrix(a)

Accounting for 63% of the variance

	Component
	1
We rapidly respond to competitive actions that threaten us.	.747
Our salespeople regularly share information within our organization concerning competitors' strategies.	.805
Top management regularly discusses competitors' strengths and strategies.	.821
We target customers where we have an opportunity for competitive advantage.	.797

Extraction Method: Principal Component Analysis.

a   1 components extracted.

Interfunctional coordination

Component Matrix(a)

Accounting for 61% of the variance

	Component
	1
All of our business functions (e.g. marketing/sales, manufacturing, research and development) are integrated in serving the needs of our target markets.	.778
All of our business functions and departments are responsive to each other's needs and requests.	.808
Our top managers from every function regularly visit our current and prospective customers.	.760
We freely communicate information about our successful and unsuccessful customer experiences across all business functions.	.774

Extraction Method: Principal Component Analysis.

a   1 components extracted.

Innovation orientation

Component Matrix(a)

Accounting for 86% of the variance

	Component
	1
Our company pays close attention to innovation.	.951
Our company emphasizes the need for innovation for development.	.949
Our company promotes the need for development and utilization of new resources.	.884

Extraction Method: Principal Component Analysis.

a   1 components extracted.

Group culture

Component Matrix(a)

Accounting for 70% of the variance

	Component
	1
Our company tries to help employees understand what is happening in the company.	.815
Our company gives employees opportunities to involve in the decision-making process.	.840
Our company promotes unity and cooperation.	.853
Our company tries to help employees understand the dynamics of the market situation.	.856
The organizational group culture towards keeping good customer relationship is strong.	.808

Extraction Method: Principal Component Analysis.

a   1 components extracted.

Information utilization

Component Matrix(a)

Accounting for 71% of the variance

	Component
	1
We use customer information to develop customer profiles.	.785
We use customer information to segment markets.	.871
We use customer information to assess customer retention behavior.	.886
We use customer information to identify appropriate channels to research customers	.861
We use customer information to customize our offers.	.810
We use customer information to identify our best customers.	.836
We use customer information to assess the lifetime value of our customers.	.846

Extraction Method: Principal Component Analysis.

a   1 components extracted.

Customer satisfaction

Component Matrix(a)

Accounting for 74% of the variance

	Component
	1
Customer satisfaction towards your organization	.875
Customers' repeat purchases	.834
Word of mouth of customers	.874

Extraction Method: Principal Component Analysis.

a   1 components extracted.

Performance

Component Matrix(a)

Accounting for 67% of the variance

	Component
	1
Market share	.774
Average customers' life time value	.800
Return on investment	.851
Overall performance of the business	.854

Extraction Method: Principal Component Analysis.

a 1 components extracted.

Employee satisfaction

Component Matrix(a)

Accounting for 80% of the variance

	Component
	1
Employees feel as though their future is intimately linked to that of this organization.	.850
The bonds between this organization and its employees become stronger.	.910
Employees are proud to work for this business unit	.899
Our people have stronger commitment to this business unit.	.895
Employees are fond of this business unit.	.922

Extraction Method: Principal Component Analysis.

a 1 components extracted.