

Investigating the Strategic Interactions Among Gartner's Eight Building Blocks of Successful Customer Relationship Management

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Abstract

Purpose : The present study intended to validate Gartner's competency model (2001) in a real-world business scenario and to explore the strategic interactions among Gartner's eight building blocks of successful customer relationship management (CRM).

Methodology : Based on the theory of the CRM maturity model (CRM3), Gartner's competency model, and the existing literature, the study identified the eight characteristics/building blocks, namely CRM vision, CRM strategy, CRM information, CRM technology, valued customer experience, organizational collaboration, CRM process, and CRM metrics. The survey method was used to collect the data through a well-validated questionnaire from the employees of the select organized retail stores located in Bhubaneswar, Odisha. The responses of 174 employees were considered for the analysis, and confirmatory factor analysis and structural equation modeling were used to analyze the interactions among the eight building blocks of CRM and to test the hypotheses.

Findings : The results indicated the mediation of CRM information, valued customer experience, CRM technology, and organizational collaboration between CRM vision, CRM strategy, and CRM metrics. It also comprehensively explained how to implement the competency model proposed by Gartner. The study concluded that CRM can be best implemented in four phases: in phase one, firms must set CRM vision and strategy; in phase two, CRM information and technology; in phase three, valued customer experience, process, and organizational collaboration; and finally, CRM metrics.

Implications : This study aimed to bridge the gap in the literature by analyzing the relationships between Gartner's eight CRM components and providing an explanation of "how and why" they interact. Additionally, it provided professionals and managers with appropriate methodologies and frameworks for the successful deployment of CRM.

Originality : This study stands out since it is the first of its type to validate Gartner's competency model in a real-world business environment. Additionally, it looked into how these elements interact with one another and offered the augmented CRM framework for effective implementation.

Keywords : CRM vision, CRM strategy, valued customer experience, CRM process, organizational collaboration

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The most widely read research in the field of consumer behavior during the last two decades has been on customer relationship management (CRM). Numerous studies on CRM theory and practices have been conducted owing to its significance (Chikako & Hamu, 2021). In the age of consumerism and competition, CRM delivers its promises and results, and experts are also in complete accord with its adoption and implementation. CRM is considered one of the important pillars of competitive advantage and the best means of survival in the VUCA world. Nonetheless, it was found that researchers' viewpoints on CRM are inconsistent and varied after focusing on the outcomes of CRM in particular. Although CRM has great potential, it far too frequently falls short of achieving the intended results in practice (Gupta et al., 2015; Reichheld et al., 2002). Hence, it is crucial to make an appropriate strategy and execute CRM in the best possible manner. Therefore, CRM systems are regarded as critical instruments that businesses can use to manage client relationships, streamline processes, and increase customer satisfaction. In order to achieve optimal outcomes, companies must have precise and up-to-date customer information throughout all departments; and must have an organizational plan that prioritizes the needs of customers (Agrawal et al., 2023). Galbreath and Rogers (1999) stated that putting CRM into practice usually means making adjustments to business procedures and consistently advancing information technology for data collection and interpretation. This makes it possible for state-of-the-art CRM software to fully capitalize on technology developments that collect and analyze data on a range of patterns and contexts in accordance with organizational requirements.

A company will be able to obtain information on important clients, client loyalty, and client preferences and choices with the use of system-based data collection and interpretation. System-based data collection will help in customer acquisition and cost reduction (Reichheld et al., 2002). However, when it does fail, it fails terribly. There are instances when utilizing CRM could not yield the desired outcomes. The failure may happen due to poor data quality, lack of user acceptance, inadequate integration, an excessive focus on technology, irrational expectations, lack of assistance and training in handling the data, reluctance to change, a failure to match with the corporate goals, inadequate customization, and ignoring customers' input and feedback. It is bound to fail if it is used prior to developing a workable customer strategy and prior to reorganizing the company (Reichheld et al., 2002). Employees might resist adopting new CRM systems, which requires effective change management strategies to overcome the resistance. Successful CRM adoption requires a careful balance between human factors and technology. Complicated interfaces can impede efficient use; thus, success hinges on user acceptance and involvement. It is imperative, but also difficult, to strike a balance between the CRM system's scalability and customization to match unique business requirements as a company expands (Raval, 2023).

It cannot be easy to ensure smooth integration with the organization's current software and technological infrastructure. It is imperative to further secure customer data, and adhering to data protection laws introduces another level of complexity (Ledro et al., 2023). A successful CRM implementation depends on defining precise CRM objectives and coordinating them with organizational objectives. As a result, companies implementing CRM need to have organized frameworks. CRM deployment is not as easy as it seems; in order to achieve better results, a systematic approach is required. For the CRM strategy to be successful over the long run, it must be in line with the organization's vision, mission, culture, and values (Gneiser, 2010).

Implementing CRM can be expensive, and if funds are not managed well, overruns may happen (Staples, 2023). It can be difficult to quantify the return on investment (ROI) in CRM; appropriate metrics and evaluation techniques are needed. A comprehensive CRM framework is required to address these pertinent issues through careful planning, efficient data capturing, effective communication, and coordination (Pohludka & Štverková, 2019). The absence of structured implementation frameworks explains why CRM outcomes are inconsistent (Sohrabi et al., 2010).

In this context, Gartner's competency model is the most reliable framework for CRM implementation. The concept of "The True CRM" has eight building blocks, which are as follows: CRM vision, CRM strategy, CRM

process, CRM technology, valued customer experience, organizational collaboration, CRM information, and CRM metrics (Khan, 2001). Despite a thorough description of Gartner's framework and its elements, there is still a paucity of empirical findings that demonstrate the framework's applicability in real-world business scenarios and explain how and why its eight components interact (Müller et al., 2023). Peelen et al. (2009) conducted the majority of the investigations that made up Gartner's framework study. It only examined the interactions between six components, though. This research aims to bridge that gap by examining the interplay between Gartner's eight successful characteristics/building blocks and providing a step-by-step implementation approach for CRM.

This research presents five fresh viewpoints on the body of CRM literature. First off, practitioners are still unsure about “what” and “how” to adopt Gartner's paradigm because not much empirical research has been done to demonstrate its applicability. Second, a study would need to be conducted to validate the applicability of the framework in real-world business. Third, the use of actual stakeholders' data would be used to confirm the validity of the framework, and ultimately illuminate its operation. Fourth, a study to determine how the components of the Gartner's CRM interact would confirm the “how” of the interactions. Finally, a test to determine the serial mediation of the building blocks would reveal the “why” of their interactions.

Review of Literature

A number of scholars have tried to define CRM as it has increasingly acquired significance in the new era of capitalism and consumerism. CRM, in a limited sense, builds a database of possible clients in order to calculate the lifetime value and acquisition and maintenance costs (Guerola-Navarro et al., 2022). However, one-to-one marketing, taken in its broadest meaning, is what moves the emphasis of marketing from transactional to relational interactions (Smith, 2023). It is both a strategy for gaining, maintaining, and improving customer relationships and a method for building, maintaining, and improving long-term relationships with customers (Chai et al., 2020). In terms of value creation and cost-benefit trade-off, it can boost the mutual value of the parties involved and thereby improve marketing efficiency. By carefully choosing clients for its many initiatives, tailoring and customizing market offerings to anticipate and meet new needs, and enhancing client loyalty and retention, it will increase marketing efficiency and effectiveness (Parvatiyar & Sheth, 2013).

In spite of this, CRM adoption has not gone as smoothly as anticipated. The past 10 years have seen a slowdown in the adoption of CRM due to its high initial cost and lack of projected returns (Foss et al., 2008). CRM software by itself cannot increase business performance and will not work if it is not applied correctly (Reichheld et al., 2002). First, companies that have failed with CRM have implemented it for their convenience rather than for the convenience of their customers, and this is the main reason for CRM failure (Edinger, 2018). Second, the goals of CRM implementation are to improve marketing effectiveness, customer analytics, customer acquisition, customer retention, and customer loyalty, but it is not possible without the necessary infrastructure, culture, technology, and cross-functional integration and collaboration (Chai et al., 2020). Third, the absence of an established blueprint for CRM execution and progress contributed significantly to the failure of CRM (Foss et al., 2008; Panigrahi et al., 2021). Finally, the CRM system loses effectiveness if staff members refuse to use it or do not use it properly.

Numerous scholars and research organizations believed that CRM effectiveness was largely dependent on strategy, technology, people, process, information management and distribution, change appetite, customer focus, and dynamic skills. Several models have tried to outline the blueprint for CRM implementation and success. Buttle (2009) developed a groundbreaking CRM value chain model that is predicated on five essential stages for a successful CRM, including client portfolio analysis, network and value proposition building, and customer life cycle management (Buttle & Maklan, 2019). The quality competitive index (QCI) model includes a range of customer acquisition and retention measures, incorporating the role of individuals in implementing these

measures through technology. Peppers and Rogers (2004) introduced the IDIC (identify, differentiate, interact, and customize) model, which emphasizes customer identification, differentiated value, customer interaction, and customization (Chetty & Thakur, 2019). Five process models, including strategic, operational, analytical, and dynamic capability CRMs, are included in Payne's (2005) paradigm. The “CRM performance scorecard” is the main component of Band's (2007) CRM paradigm.

Similarly, the concept of the CRM maturity model (CRM3) has been developed and popularized by various researchers, consultants, and industry experts. The creation of the CRM3 model cannot be exclusively credited to any one individual or organization. Gartner Inc., a leading research and advisory company, has offered insights into CRM maturity and developed models to assess an organization's CRM capabilities. The creation of CRM maturity models has also included input from other consulting firms and prominent figures in the industry. It directs the creation of increasingly complex CRM procedures that enhance customer satisfaction, foster stronger customer relationships, and boost organizational effectiveness (Das et al., 2019).

A corporation can customize its CRM strategy to match changing business demands as it advances through the maturity levels, gaining a greater understanding of its customers. Gartner Inc. examined seven businesses from seven distinct industries, including retail, chemicals, software, hardware, banking, and entertainment. These businesses included BMC Software, Charles Schwab, Compaq Computer, Dow Chemical, Harrah's Entertainment, Williams-Sonoma, and Wells Fargo Bank. The analysts discovered that these companies were mature in terms of CRM vision, CRM strategy, valued customer experience, organizational collaboration, process, information, technology, and metrics, entitled as the eight characteristics of CRM winners, respectively. The reorganization and management change of the company are based on these. While Peelen et al. (2009) did take into account all eight of these features, no other study has effectively established the links between these well-defined characteristics, as stated by Gartner (2001). Thus, in order to determine the relationships between the eight components of “Gartner's Model” in a practical setting and to comprehend “how” and “why” it functions, a study on the model is necessary.

Objectives and Hypotheses of the Study

Objectives of the Study

The main objective of the present study is to create a CRM model by drawing inspiration from previously published works. It aims to bridge the gap in the body of existing literature by combining the fragments to create a full model based on Gartner's model of CRM. The study aims to achieve the following objectives:

- (1)** Verify the CRM framework developed by Gartner (2001).
- (2)** Analyze the interactions among the eight building blocks of CRM.
- (3)** Examine whether the components could be serially mediated.

Hypotheses of the Study

The company's future CRM status is outlined in the CRM vision and strategy. To sustain a long-term engagement with clients, the business needs a defined CRM vision and strategy (Scheibenreif, 2019). These are the first components of the CRM model as they determine the scope of CRM within the organization (Chai et al., 2020). They also determine the best mix of information and technology to attract, retain, and satisfy customers (Lemon & Verhoef, 2016). Consequently, the kind of information and technology that a business needs can be made clearer

by its CRM vision and strategy (Schwarz, 2023). Thus, the following hypothesis is formulated based on the previous discussion:

☞ **H₁** : CRM vision and strategy have positive effects on CRM information and technology.

The CRM process is a comprehensive strategy for maintaining the personalization of every customer interaction, and the CRM system offers the data and features needed to carry this out. Therefore, CRM processes can be effective if the organization has precise and accurate information about its customers. CRM application executives should concentrate on consistent and accurate customer data and insights in order to develop and enhance their company's CRM process and customer experience (Norrie, 2021). Thus, the following hypothesis is formulated based on the preceding discussion:

☞ **H₂** : CRM information has a positive effect on customer experience and the CRM process.

Furthermore, the literature claims that cross-functional integration, back-office enterprise operations, and advanced IT infrastructure are necessary for successful CRM (Deloitte Digital, 2019). The successful integration of many departments enhances consumer access, interaction, and insight while also positively impacting corporate performance. Close collaboration within the firm is necessary for the success of such initiatives (Baker, 2021). CRM success requires a commitment to improve organizational culture, capabilities, and collaboration. True organizational collaboration can only be achieved through the use of technology that enables the integration of cross-functional and cross-departmental activities. The adoption of appropriate technology impacts organizational collaboration and capacities (Shonfeld et al., 2021). As a result, CRM technology ought to impact CRM processes and organizational collaboration. Thus, the following hypothesis is formulated based on the previous discussion:

☞ **H₃** : CRM technology has a positive effect on organizational collaboration and the CRM process.

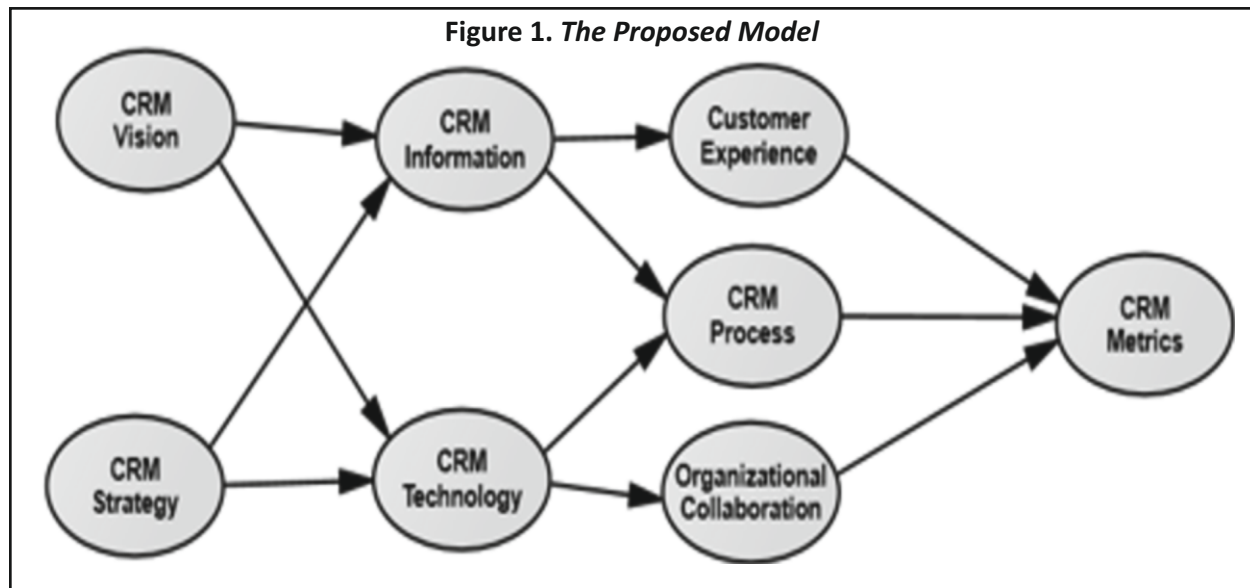
The business must also be client-focused, prioritizing customer demands over those of its products or brands. CRM needs to engage customers in addition to concentrating on business. Customers cannot build relationships if companies do not talk to them. The purpose of customer management is to establish reciprocity, i.e., to ensure that the actions of the company match the actions of the customers and vice versa. The only way to do this is to implement proper business procedures (Starita, 2020). The CRM process's implementation affects CRM metrics and business performance (Lerner, 2023).

Outstanding customer service is becoming more and more important in CRM initiatives. A satisfying client experience ought to result from CRM. This is achievable if the business chooses the appropriate KPIs for CRM performance and applies them consistently. Thus, a company's measures for measuring CRM success are influenced by a positive customer experience (Schwager & Meyer, 2007). In order to establish a long-lasting source of competitive uniqueness, application leaders and CRM program managers need to work together to design and execute exceptional customer experiences. This can only be accomplished by supporting organizational collaboration. Consequently, valued customer experience, CRM process, and organizational collaboration should positively affect CRM metrics, measuring CRM success (Zendesk, 2023). Thus, the following hypothesis is formulated based on the previous discussion:

☞ **H₄** : Customer experience, CRM processes, and organizational collaboration positively affect CRM metrics.

Proposed Model of the Study

We suggest testing a CRM model based on the four general hypotheses mentioned above in relation to how CRM



vision and strategy affect CRM metrics via CRM information, CRM technology, customer experience, organizational collaboration, and CRM process (Figure 1).

On the basis of the proposed model, the study also draws the following secondary hypotheses :

- ⇒ **H₅** : The relationship between CRM vision and CRM metrics is serially mediated by CRM information and a valued customer experience.
- ⇒ **H₆** : The relationship between CRM vision and CRM metrics is serially mediated by CRM information and CRM process.
- ⇒ **H₇** : The relationship between CRM strategy and CRM metrics is serially mediated by CRM technology and organizational collaboration.
- ⇒ **H₈** : The relationship between CRM strategy and CRM metrics is serially mediated by CRM technology and CRM process.

Research Methodology

A survey method was used to collect the data from the respondents. The questionnaire was designed to assess the components of CRM as defined by Gartner (2001), namely, CRM vision, CRM strategy, valued customer experience, organizational collaboration, CRM information, CRM technology, CRM processes, and CRM metrics (three items taken for each construct). The framework utilized to measure the CRM components is Gartner's CRM best practices: from vision to collaboration & processes to measurements (Thompson, 2019). The questionnaire was also modified based on the scale used by Peelen et al. (2009). The information was gathered from a few carefully chosen organized retail locations in Bhubaneswar, Odisha, India, including Big Bazar, Pantaloons, Vishal Mega Mart, etc.

The administrators of those establishments checked the questionnaire to make sure it was appropriate before any data were taken. The questionnaire was revised in light of the store managers' recommendations. In pilot research, the reliability of the scale was assessed using a small sample of 30 respondents (Hair Jr. et al., 2007).

Questionnaire-based primary data were collected post-pilot study during July – August 2023 from the employees of the retail chains who were working in various positions and capacities. Only 174 respondents were considered for the study, based on the completeness of the data collected from 200 respondents in all categories. Structural equation modeling (SEM), confirmatory factor analysis, and serial mediation were conducted for the hypotheses testing and validation.

Data Validation and Demographic Profile Analysis

Data Adequacy

Data was analyzed to determine normality in terms of skewness and kurtosis. The kurtosis value was deemed appropriate since it is below the upper normalcy requirement of 3.3, as propounded by Sposito et al. (1983). To check for common method bias in the data, Harman's single-factor (Fuller et al., 2016) technique is used. The single factor's total variance is found to be less than 50% after loading all the items of latent constructs into a single factor (Podsakoff et al., 2003), indicating no influence of the common method bias. Cronbach's alpha, which is used to quantify reliability, ranges from 8.3 to 8.7 for all constructs, indicating that all constructs are internally consistent (Cronbach, 1951).

Demographic Profile Analysis

The demographics of the respondents are shown in Table 1. Out of the 174 respondents, 53% of the respondents were males, and 47% of the respondents were females. On the basis of the age of the respondents, 44% of the respondents were under the age of 29, 36% were between the ages of 30 and 39, 16% were between the ages of 40 and 49, and 4% were over the age of 50 years.

Validity of Constructs

Construct validity is established through the use of discriminant and convergent validity. The average extracted variance (AVE) and composite reliability (CR) must be higher than 0.5 and 0.7, respectively, in order to demonstrate convergent validity. Furthermore, for discriminant validity to be shown, each concept's AVEs must be greater than the maximum shared variance (MSV) (Fornell & Lacker, 1981; Hair Jr. et al., 2007).

The measurement model is shown in Figure 2. The factor loadings of the items in the constructs are all above 0.7, indicating that all items measure what they are intended to measure, indicating strong convergent validity.

Table 1. Demographic Profile Analysis

Characteristics	Particulars	Number of Respondents (Out of 174)	Respondents (in %)
Gender	Male	93	53
	Female	81	47
Age (Years)	(≤ 29)	77	44
	(30 – 39)	62	36
	(40 – 49)	28	16
	≥ 50	7	4

Figure 2. Measurement Model

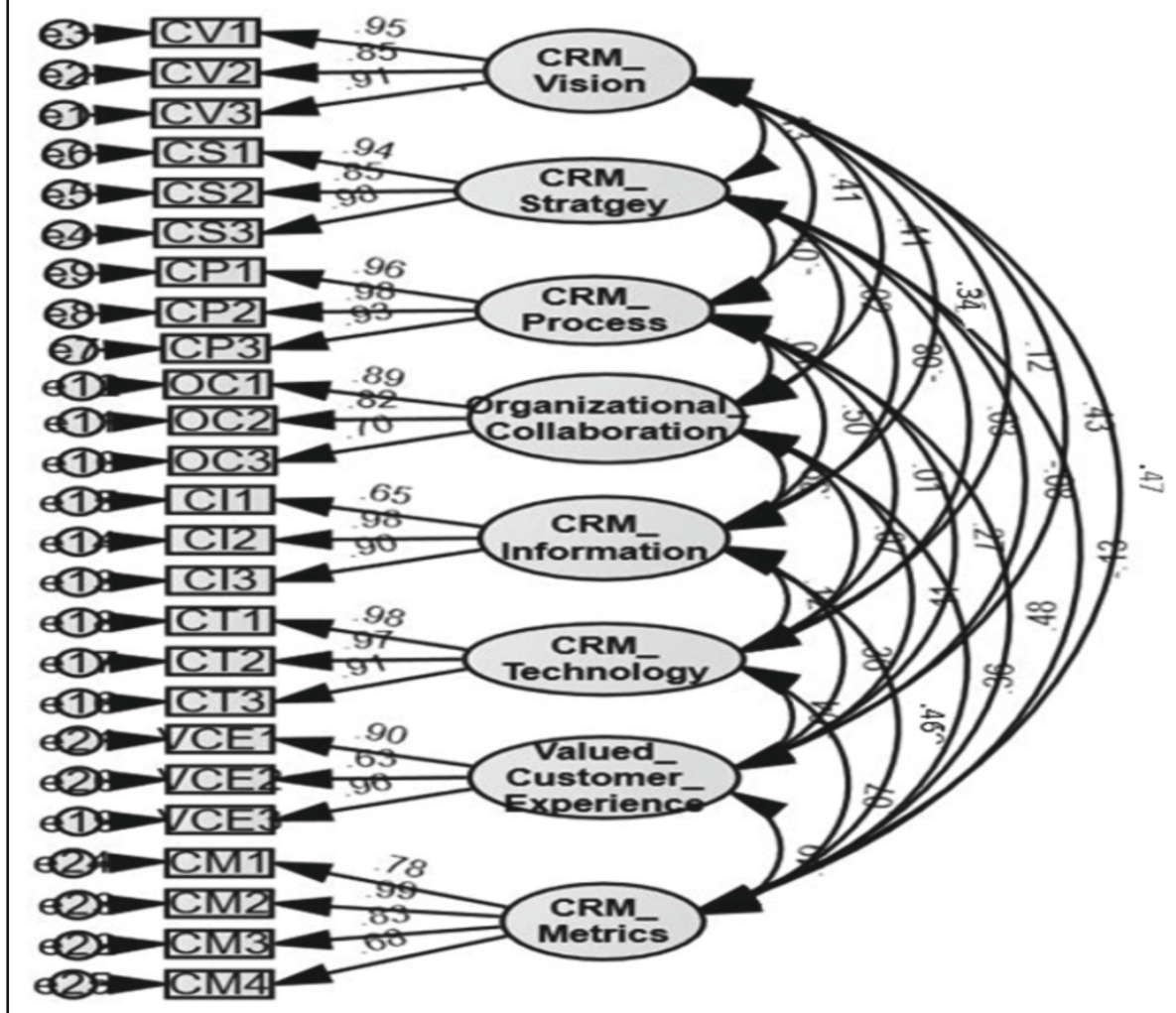


Table 2. Construct Validity

Constructs	CR	AVE	MSV
CRM Vision	0.93	0.85	0.28
CRM Strategy	0.94	0.91	0.34
Organizational Collaboration	0.92	0.83	0.23
CRM Technology	0.92	0.76	0.003
Valued Customer Experience	0.96	0.87	0.29
CRM Process	0.84	0.63	0.09
CRM Information	0.93	0.82	0.31
CRM Metrics	0.85	0.73	0.34

Table 2 illustrates how all constructs support composite reliability with CR values more than 0.7 and AVE values greater than 0.5. Additionally, every AVE surpasses MSVs, demonstrating an elevated degree of discriminant validity. As a result, the scale's items accurately describe the latent constructs and reveal robust construct validity.

Data Analysis and Results

SEM is used to test the proposed model of underlying constructs. The study used AMOS-20 for the analysis.

Measurement Model

Confirmatory factor analysis (CFA) is used to determine if the data fits the proposed model or not (Hair Jr. et al., 2007; Teo, 2011). The goodness of fit index (GFI), adjusted GFI (AGFI), normed fit index (NFI), comparative fit index (CFI), and parsimonious normed fit index (PNFI) values are found to be greater than 0.9, the root mean square of approximation (RMSEA) less than 0.08, and the chi-squared over degrees of freedom (χ^2/df or CMIN/DF) less than 2.5 indicate good model fit (Gerpott et al., 2001; Hair Jr. et al., 2007; Homburg & Baumgartner, 1995; Hu & Bentler, 1999). Hooper et al. (2008) proposed χ^2/df or CMIN/DF, RMSEA, SRMR, CFI, and PNFI to determine model fit because these indices are not affected by the sample size.

Table 3 presents the fit indices for the measurement model. The observed values of GFI, AGFI, NFI, and CFI are 0.97, 0.96, 0.98, and 0.99, respectively; (χ^2/df) is 1.69; RMSEA and SRMR are 0.03 and 0.02, respectively. The results show the strong model fit of the measurement model. Since the measurement model provides a good match to the data, we therefore, established the structural relationships through path analysis by using a structural model (Teo, 2011).

Structural Model

Table 4 shows the fit indices for the structural model (Figure 3), which indicates a good fit. Links are subsequently analyzed since the structural model fits the data very well.

Table 3. Model Fit (Measurement Model)

Indices	Observed Values	Threshold Value	References
CMIN/DF	1.69	$0 > \text{CMIN/DF} < 5$	Tabachnick & Fidell (2007) ; Wheaton et al. (1977)
RMSEA	0.03	< 0.08	Hu & Bentler (1999)
GFI	0.97	> 0.9	Gerpott et al. (2001) ; Homburg & Baumgartner (1995)
AGFI	0.96	> 0.9	Hair Jr. et al. (2007)
NFI	0.98	> 0.9	Hu & Bentler (1999)
CFI	0.99	> 0.9	Byrne (1998)
SRMR	0.02	< 0.05	Byrne (1998)

Table 4. Model Fit (Structural Model)

Indices	Observed Values	Threshold Value	References
CMIN/DF	2.45	$0 > \text{CMIN/DF} < 5$	Tabachnick & Fidell (2007); Wheaton et al. (1977)
RMSEA	0.06	< 0.08	Hu & Bentler (1999)
GFI	0.92	> 0.9	Gerpott et al. (2001); Homburg & Baumgartner (1995)
AGFI	0.90	> 0.9	Hair Jr. et al. (2007)
NFI	0.86	> 0.9	Hu & Bentler (1999)
CFI	0.91	> 0.9	Byrne (1998)
SRMR	0.04	< 0.05	Byrne (1998)

Figure 3. Structural Model

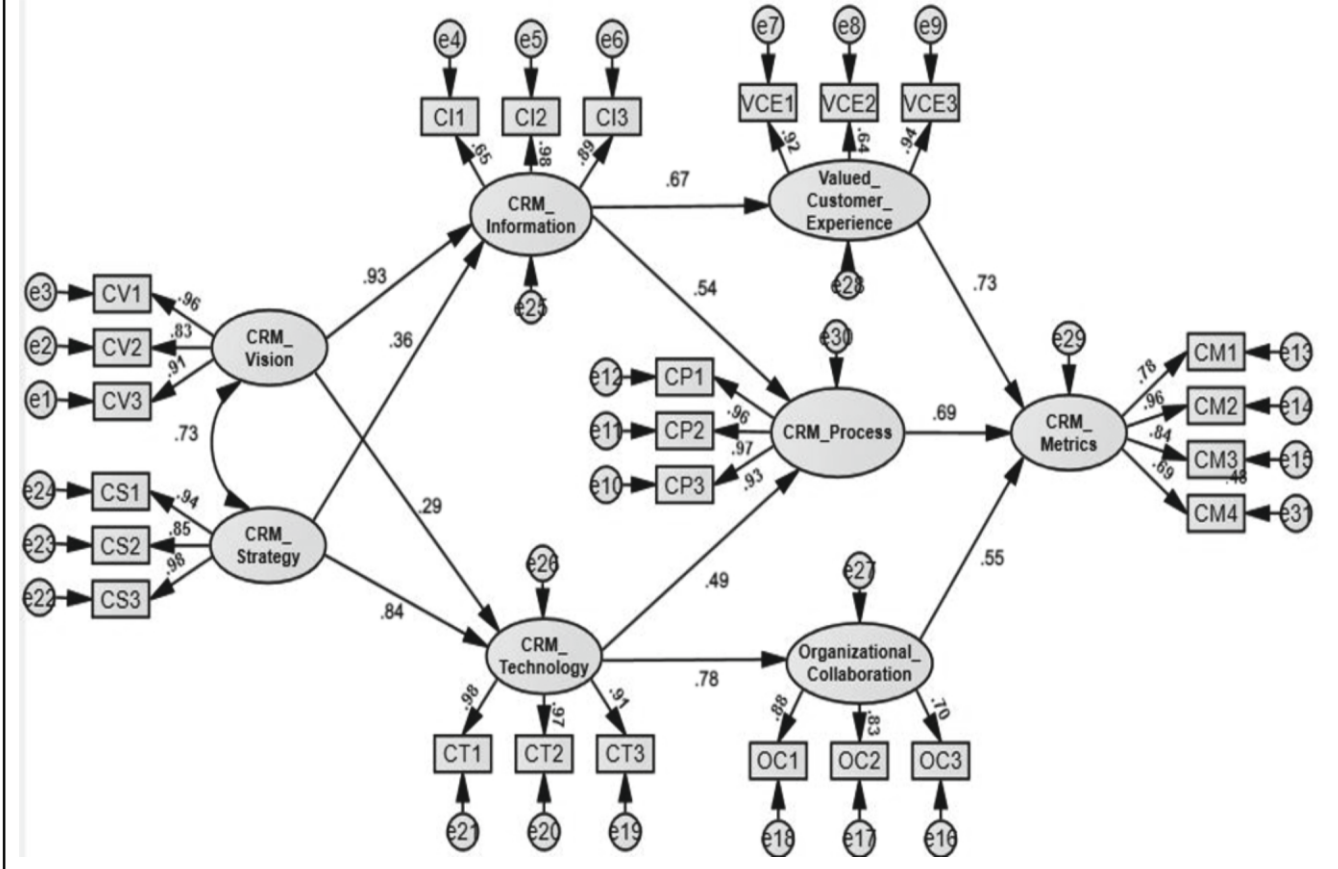


Table 5. Regression Weights

Relationships	Regression Weights	Level of Significance
CRM Information ← CRM Vision	0.927	0.000
CRM Technology ← CRM Strategy	0.838	0.000
CRM Information ← CRM Strategy	0.358	0.001
CRM Technology ← CRM Vision	0.289	0.020
Valued Customer Experience ← CRM Information	0.668	0.000
CRM Process ← CRM Information	0.537	0.000
CRM Process ← CRM Technology	0.489	0.000
Organizational Collaboration ← CRM Technology	0.778	0.000
CRM Metrics ← Valued Customer Experience	0.727	0.000
CRM Metrics ← CRM Process	0.688	0.000
CRM Metrics ← Organizational Collaboration	0.547	0.000

All relationships in the structural model are highly significant at $p = 0.000$, except for the relationship between CRM vision and CRM technology, which is statistically significant at $p = 0.05$. CRM vision on CRM information ($\beta = 0.927, p = 0.000$); CRM strategy on CRM technology ($\beta = 0.838, p = 0.000$); CRM strategy on CRM information ($\beta = 0.358, p = 0.001$); CRM vision on CRM technology ($\beta = 0.289, p = 0.020$); CRM information on

valued customer experience ($\beta = 0.668, p = 0.000$); CRM information on CRM process ($\beta = 0.537, p = 0.000$); CRM technology on CRM process ($\beta = 0.489, p = 0.000$); CRM technology on organizational collaboration ($\beta = 0.778, p = 0.000$); valued customer experience on CRM metrics ($\beta = 0.727, p = 0.000$); CRM process on CRM metrics ($\beta = 0.688, p = 0.000$); and organizational collaboration on CRM metrics ($\beta = 0.547, p = 0.000$) are found to be statistically highly significant. The regression weights of the relationships of the building blocks are presented in Table 5.

Serial Mediation

When several mediators affect one another, it is known as serial mediation; and suggests that the mediators are involved in a long-distance or hierarchical causal link. If long-distance mediation or the causal chain of mediators is important, serial mediation may be asserted (Hayes, 2013). The bootstrap approach is used to test serial mediation using Gaskin's serial mediation estimate (Gaskin, 2020). Hayes (2013) stated that whether the point estimate of the mediating variable is zero within a 95% bias-corrected and accelerated confidence range (BCaCI) determines the statistical significance of the indirect mediating effects of the variables. As a result, a variable with a no-point estimate with a zero interval is considered statistically significant. In the serial-multiple mediation test, Hayes (2013) recommended using 10,000 bootstrap samples for mediation analysis. As a result, the current study relied on data from 10,000 bootstrap samples, with a 0.05 significance level, and hypothesized constructs are tested using regression-based technique and bootstrap method. Non-standardized beta coefficients are calculated to eliminate Type 1 errors caused by distribution, while the bootstrap method is used to overcome this problem.

Discussion

The serial mediation of CRM information and customer experience between CRM vision and CRM metrics ($\beta = 0.455, p = 0.000$) is found to be significant because the zero is outside the lower and upper bounds (Hayes, 2013), as shown in Table 6. According to Hayes (2013), there is a significant correlation between CRM vision and CRM metrics and serial mediation of CRM information and CRM process ($\beta = 0.346, p = 0.000$). In addition, the serial mediation of CRM information and valued customer experiences between CRM strategy and CRM metrics is statistically significant ($\beta = 0.176, p = 0.035$). Also, the serial mediation of CRM technology and CRM process between CRM strategy and CRM metrics is statistically significant ($\beta = 0.284, p = 0.023$). Finally, there is a highly significant serial mediation of CRM technology and organizational collaboration between CRM strategy and CRM metrics ($\beta = 0.360, p = 0.000$). However, the serial mediation of CRM technology and CRM process

Table 6. Serial Mediation

Relationship	Estimate	Lower	Upper	p-value
CRM Vision → CRM Information → Valued Customer Experience → CRM Metrics	0.455	0.064	0.29	0.000
CRM Vision → CRM Information → CRM Process → CRM Metrics	0.346	0.068	0.27	0.000
CRM Vision → CRM Technology → CRM Process → CRM Metrics	0.098	-0.022	0.08	0.071
CRM Vision → CRM Technology → Organizational Collaboration → CRM Metrics	0.124	-0.003	0.08	0.091
CRM Strategy → CRM Information → Valued Customer Experience → CRM Metrics	0.176	0.034	0.27	0.035
CRM Strategy → CRM Information → CRM Process → CRM Metrics	0.134	-0.015	0.09	0.087
CRM Strategy → CRM Technology → CRM Process → CRM Metrics	0.284	0.013	0.06	0.023
CRM Strategy → CRM Technology → Organizational Collaboration → CRM Metrics	0.360	0.002	0.11	0.000

between CRM vision and CRM metrics is not statistically significant at $p = 0.05$ (refer to Table 6). Additionally, it is discovered that, at $p = 0.05$, the serial mediation of CRM information and CRM process between CRM strategy and CRM metrics, as well as the serial mediation of CRM technology and organizational collaboration between CRM vision and CRM metrics, are statistically insignificant.

CRM vision and strategy are the most important components of successful CRM. Since vision and strategy serve as the foundation for the other components of CRM, the organization must engage CRM experts to develop a vision and appropriate strategy for successful CRM. CRM vision and strategy have a positive effect on CRM information and technology. This is consistent with the findings of Becker et al. (2009) and Peelen et al. (2009). Organizations are able to offer a better customer experience through the use of customer information or knowledge. Information and technology both have an impact on the CRM process; whereas, technology fosters organizational collaboration in particular. Finally, metrics are influenced by customer experience, processes, and organizational collaboration. Therefore, the eight CRM components identified by Gartner's model are broken down into four phases: phase one comprises vision and strategy; phase two comprises information and technology; phase three comprises process and organizational collaboration; and phase four comprises metrics. Additionally, it is discovered that every lower-level component positively affects the upper level. The causal model was used to test eight hypotheses, four of which, i.e., H_1 , H_2 , H_3 , and H_4 , indicating direct relationships among the model constructs, are fully accepted as all direct effects are statistically significant (Table 5) and the remaining four, i.e., H_5 , H_6 , H_7 , and H_8 , indicating indirect effects (serial mediation), are partially accepted because only five serial mediation hypotheses out of eight are found to be statistically significant (Table 6).

Conclusion

Based on the literature, the hypotheses are formulated to test the relationship between the constructs in Gartner's CRM framework. The study establishes the mediation of CRM information, valued customer experience, and CRM process between CRM vision and CRM metrics. Furthermore, the study also establishes the mediation of CRM information, valued customer experience, CRM technology, and CRM process between CRM strategy and CRM metrics. The results show that vision and strategy are the foundations of CRM success and have a positive influence on data collection and technology use. In addition, information and technology influence customer experience, process, and collaboration. Finally, customer experience, process, and collaboration influence the metrics. The study also finds that both vision and strategy have a positive effect on CRM metrics through information and technology, as well as customer experience, process, and collaboration. The study, therefore, examines the direct and indirect relationships among the eight building blocks of CRM.

The target market, the type of customer experience to be offered, and the value proposition of the company's offers are all detailed in the CRM vision. The CRM strategy guides all other areas of the company's operations. The customer experience should be built with input from both connected parties. Developing relationships with customers is a need for businesses. A CRM strategy outlines the tactical decisions a business plans to take in order to achieve its customer-focused goals. It offers information on the company's competitive environment, the strategies it will use to win, and the specific advantages it will highlight in its quest for success. CRM represents the evolutionary shift in marketing, transitioning from product-focused management to a customer-centric approach (Polner & Bottorff, 2022).

The top executives of a company should prioritize and pay attention to customer relations. Changes in internal procedures, systems, and organizational structure, as well as in staff competencies, behaviors, pay, and incentives, are all part of organizational collaboration. CRM processes need to incorporate every small process into the larger one to create a smooth macro process that aims to provide happy customers. Customer data serves as the foundation for CRM information. For CRM to be successful, customer data must be gathered, maintained,

analyzed, shared, and used across the entire organization. CRM technology offers the operational interactions and analytical insights required to forecast client behavior. Businesses must exercise caution while putting into practice unified CRM technology, which can offer a comprehensive assessment of a business's CRM efficacy. CRM metrics, to be customer-centric, create quantifiable, company-specific CRM objectives, and track the indicators accurately. CRM metrics will not only determine the degree of success but also offer information for future strategy and strategic development.

CRM strategy and vision have an impact on CRM metrics. In other words, CRM strategy establishes the kind of technology that businesses should employ, and technology promotes improved departmental collaboration and integration, which in turn improves metrics (Rodriguez & Boyer, 2020). Technology is necessary for CRM to operate, but technology can only do so with exact data. For processes, customer experiences, and cross-channel integration to be effective and produce improved performance metrics, they require the availability of relevant data and suitable technology.

Managerial and Theoretical Implications

This study has considerable implications for corporate managers, academicians, as well as scholars. The study's conclusions are critical for managers implementing CRM. CRM is more than an IT project; it is rooted in the company's vision and strategy. The ability to achieve vision and strategy positively affects customer information and technology, which in turn positively affects customer experience, processes, and collaboration, enabling the organization to achieve CRM metrics. The existing body of research provides strong support for the study's conclusions. Peelen et al. (2009) provided support for the relationships among the CRM components. According to Jayachandran et al. (2005), effective CRM necessitates a clear vision and strategy alignment, improved customer insights and technology to deliver customer value, well-defined processes, and cross-functional integration. A business can increase value for its stakeholders by utilizing cross-functional integration, procedures, and experiences (Boulding et al., 2005).

Limitations of the Study and Future Research Directions

As the study is confined to only the selected retail stores of Bhubaneswar and with 174 observations, it may lack generalizability. However, a larger sample across the country may be used to improve generalizability. The results cannot be extrapolated to other industries because the respondents were limited to a retail occupation. Even though the retail industry was the study's primary emphasis, other industries can also benefit from the findings of this research. Lastly, to understand, establish, and generalize the results, the model needs to be verified in new contexts, cultures, and industries. Although the data are cross-sectional, longitudinal data can be used for future research.

Authors' Contribution

Dr. Subhasish Das and Dr. Amiya Kumar Mohapatra conceptualized and conceived the idea and developed the framework for the research. Furthermore, Dr. Amiya Kumar Mohapatra and Dr. Debasis Mohanty substantially extracted the research papers from reputed publishers to find the research gaps. Dr. Subhasish Das and Dr. Sharad Chaturvedi collected and analyzed the data by adopting a suitable methodology. Dr. Amiya Kumar Mohapatra and Dr. Subhasish Das systematically analyzed the results and drafted a detailed manuscript. Dr. Debasis Mohanty and Dr. Sharad Chaturvedi concluded the research outcomes along with the necessary implications.

Conflict of Interest

The authors certify that they have no affiliations with or involvement in any organization or entity with any financial interest or non-financial interest in the subject matter or materials discussed in this manuscript.

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