

## WHAT DO MANAGERS THINK ABOUT THE SUCCESS POTENTIAL OF CRM CAMPAIGNS?

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### Abstract

This research analyzes cause-related marketing (CrM) from the perspective of companies. The study aims to achieve a better understanding about what managers think about CrM by analyzing the level of acceptance and usage of this marketing tool, based on the UTAUT model. Using in-depth interviews as research method, we conclude that managers see the benefit of company partaken in initiatives as such, but not necessarily CrM. The reasons why managers choose to participate in Cause-related Marketing initiatives originate from the mix obtained through improving the firm by doing something considered socially positive. CrM was well evaluated by the participants and considered well positioned in terms of acceptance and usage, based on four factors: performance and effort expectancy, social influence, and facilitating conditions. Interviewees expressed excitement towards CrM and believe in it as a powerful tool to improve the firms' image and consumers feeling towards it. While the literature uses several concepts (Corporate Social Responsibility or Social Marketing), the interviewees emphasize genuine caring and showing interest, time and funds to support consumers social concerns.

**JEL classification:** M31;

**Keywords:** CRM, UTAUT model, performance expectancy, effort expectancy, social influence.

### 1. Introduction

The essence of CRM is marketing the product, service, brand or company through the link with a non-profit organization (Berglind, Nakata, 2005). This tie between these two parties and the final consumer is an upgraded strand of Corporate

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Social Responsibility, when comparing to donations, because the firm cares about one specific cause, which will have an impact on the perceived image that the consumer has about it (Quinones et Rebollo, 2009). According to Bennett (2008, p.44), "Although a substantial academic literature exists concerning consumer perspectives on CrM (...) research into corporate attitudes towards CrM has been negligible". This research serves the attempt to fill this void, and further explore the perspective of companies regarding CrM, assuming the purpose of finding out to which extent are companies aware of the existence of CrM, the benefits that this marketing tool can present to firms and how to implement it as a marketing strategy.

Considering the subject under analysis, some research questions were perceived as more relevant:

- How do managers perceive the CrM as a marketing tool? How do they perceive the potential success of CrM campaigns?
- What are the required elements to implement this type of marketing tool? And which advantages might result from this implementation?
- Which factors or elements do managers consider obstacles or barriers when considering the adoption of CrM?

## **2. Literature Review and research model**

### CrM: a win-win-win situation for all involved?

Facing an increasing concern regarding humanitarian topics, nowadays it is unthinkable the possibility of a company being something other than socially responsible, as "consumers are now looking closely at companies who make claims regarding their involvement on social issues" (Bronn, Vrionni, 2001, p.207). This demands companies to be socially responsible (Robinson et al., 2012) and further differentiate themselves and their products from competitors (Bronn, Vrionni, 2001). This way CrM emerged as a communication and differentiation tool used by several companies (Murphy, 1997).

Defined by Vanhamme et al. (2012, p. 259) as a "social initiative in which organizations donate to a chosen cause in response to every customer purchase made", CrM is often characterized as a win-win-win situation (Silva, Martins, 2017), because all the parts involved benefit from it: the company, the non-profitable organizations (NPOs) and final consumers (Berglind, Nakata, 2005).

In the consumer perspective, CrM, stimulates moral elevation, inspiration and motivation on customers to act on behalf their beliefs, frees them of the choice of which cause to support, making the action of helping more regular and convenient (Romani et Grappi, 2014; Berglind, Nakata, 2005), and also, consumers appreciate "the idea of contributing to the society while satisfying their individual needs" (Kim, Lee, 2009, p.467). For the cause, CrM allows non-profit organizations to get access to more financial resources, get more exposure and get more message efficacy and, in some cases, to receive "human resources in the form of new volunteers and advocates" (Berglind, Nakata, 2005, p.449). Additionally, for firms it promotes morale, retention and recruitment (Berglind, Nakata, 2005; Duncan, Moriarty, 1977; Bronn, Vrionni, 2001), it decreases the impact of negative publicity (Varajadan, Menon, 1988), it facilitates the entry in new markets (Varajadan, Menon, 1988), increases the possibility to charge higher or premium prices (Bronn, Vrionni, 2001), and, probably, it is the most important benefit enhancement of consumer's preferences as it also increases the choice of a specific brand, when in comparison with competitors.

These are some of the main benefits that can be obtained due to CRM (Duncan, Moriarty, 1977; Barone et al, 2000; Bronn, Vrioni, 2001).

Even though not so notorious, or with the same level of impact, comparing to the potential benefits, it is important to state that CrM also presents disadvantages and risks for the company: besides the fact that CrM campaigns can backfire and hurt the reputation of both parties involved (Demetriou, et al., 2010), CrM tends to appeal only to people sympathetic with the cause (and it's nearly impossible to find a cause that appeal to everyone), can have "a negative effect on those members of a society who are critical of the cause", and can lead to a reduction in the relatedness and affinity that some consumers might feel toward the company (Sheikh, Beise-Zee, 2011, p.28).

Despite the fact that the numerous advantages surpass the risks that CrM presents for the parties involved, it has been the subject of harsh critics and skepticism (Barone et al., 2000). Under scrutinized analysis is the motivation that drives companies to engage with causes (Smith, Stodghill, 1994). Consumers often question the reasons why firms embrace a campaign of this kind: "whether a company's support of a social cause is designed to benefit the cause or the company" (Barone et al., 2000, p.249). Even published authors that study this topic have divergent opinions regarding it: Demetriou et al (2010) assumed to interpret CrM as a commitment from the company to the society where the firm operates; Robinson et al (2012) sees this tool as a two purpose type of marketing, because it supports a social cause, while simultaneously improves the firm's performance; Liesse (1990) believes that when recurring to CrM profitable organizations are trying to profit from non-profit organizations; authors, like Bronn, Vrioni (2001) consider these campaigns an attempt to look good after a negative situation; and few even contemplate CrM campaigns as a diversionary tactic to hide deeper problems and "clever manipulation to enrich a corporation's coffers" (Berglind, Nakata, 2005, p.444). As consumers, we are accustomed to denoting "social responsibility as a behavior of companies and philanthropy as a behavior of individuals, but when an individual has control of a company, these distinctions become blurred", and we lose insight of the real motives that underlie behind these kind of initiatives (File, Prince, 1998, p. 1529).

With the intent to fight the skepticism, extensive literature exists to help corporations achieve a successful CrM campaign, but the question remains: are managers aware of what take under consideration when planning a CrM campaign? According to the literature, firms should, in order to implement a successful campaign: present a consistent and believable contribution to a cause (Bronn, Vrionni, 2001), tie the cause to the organization, use this tool as a long term strategy (Bronn, Vrionni, 2001), "carefully pair the cause and company" (Berglind, Nakata, 2005, p.452) because the level of company-cause fit influences the consumer (Grupta, Pirsch, 2006), choose a cause that suits the firm's customer profile, the characteristics of the firm's product, and the brand image and positioning (Varajadan, Menon, 1988), be genuine and transparent in their behavior as a trustworthy campaign is crucial for the support of consumers (Bronn, Vrionni, 2001; Webb, Mohr, 1998) and most important, be very careful about how consumers perceive the company's motivation and study the customer knowledge regarding the topic (Bronn, Vrionni, 2000; Barone et al., 2000).

The truth is that the line between altruism or exploitation is blurred (Berglind, Nakata, 2005), according to File & Prince, the "debate continues over the relative balance of self-interest and self-lessness" (1998, p.1537). It's difficult to discover the real reasons why companies choose to adopt this marketing tool, but

according to Folse et al. (2014), advertisers have expressed interest in the persuasiveness of this marketing tool. Could be due to the realization of the benefits that can derive from CRM (Demetriou, et al., 2010) such as “enhancing the image of their company”, product promotion (File, Prince, 1998, p.1531) or increase sales (Nowak, Clark, 2003), to achieve economic and social objectives (Ross, et al., 1991), to demonstrate their “responsiveness to society’s heightened expectation and demands for responsible corporate behavior” (Demetriou, et al., 2010, p.288), because managers are feeling pressured to tie their philanthropic activities with corporate strategies to improve overall performance (Webb, Mohr, 1998); because a firm’s performance is being judged on the impact it has on the environment and society (Sheikh, Beise-Zee, 2011), or even because “CrM allows corporations to benefit from their philanthropic investments by combining charitable contributions with innovative marketing techniques” (Ross, et al., 1991, p.58)

From the company’s perspective, even though this type of marketing is not the easiest to communicate, it is usually cheaper and more easily adjustable to different customer targets (Sheikh, Beise-Zee, 2011). In addition to the cheapness and targeting flexibility benefits, authors like Till and Nowak (2000) and Vanhamme et al. (2012), take this subject to a higher level and justify the adoption of CrM due to two distinct approaches: tactical, in which the ultimate purpose is to increase “revenue through the improved effectiveness of the profit base organization’s sales promotion efforts” (Vanhamme et al., 2012, p. 261) or strategic, which consists in a long term focus on improving the perceived corporate image on consumers’ minds.

Ultimately, even if not conducted entirely for the “right” reasons, CrM still gives everyone involved the possibility to help those in need, benefits the elected cause and the company, elevates consciousness about others’ needs, helps developing a more compassionate marketplace and motivates social responsibility among businesses (Berglind, Nakata, 2005).

Despite the fact that we don’t know much on how organizations “balance philanthropic motivations with those of corporate self-interest” (File, Prince, 1998, p.1530), and at which percentage each contributes to the use of CrM, because there isn’t a lot of research on the company’s perspective about it (Bennett, 2014), according to Demetriou et al. (2010, p.266), the number of corporations realizing the benefits of CrM is increasing: companies are now “adopting it as marketing tool to achieve their marketing objectives, by demonstrating commitment to improving the quality of life in the communities in which they operate”, and CrM is gaining popularity as promotional tool between managers and fundraisers. According to Varajadan and Menon (1988), factors like proximity, time frame, consumer’ personal characteristics, level of association, choice of the cause and geographic scope influence the impact of CrM campaigns.

Considering that the tendency is for CrM campaigns increase in the future (Bednall et al. 2000), authors like Smith, Higgins (2000) call the need to further analyze the social context in which CrM emerge and evolve.

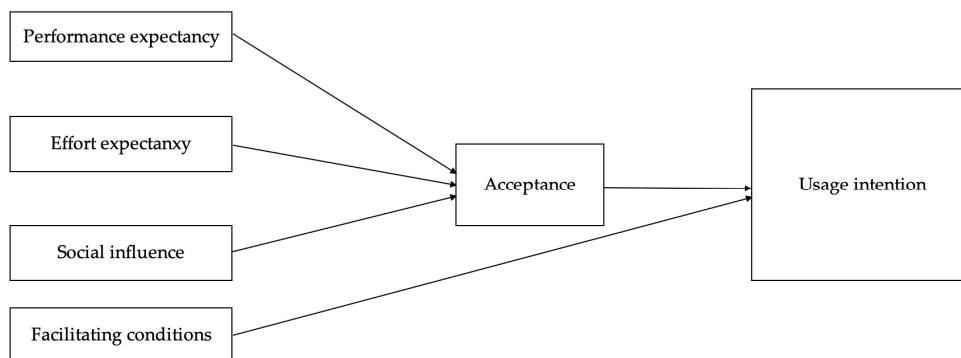
#### Are managers ready to adopt CrM?

In order to analyze this subject, surfaced the need to elect a model to guide the development and interpretation of the collected in-depth interviews. After analyzing several different models, we selected the UTAUT model - Unified Theory of Acceptance and Use of Technology (developed by Venkatesh, Morris, Davis and

Davis, 2003). Being a model that unifies several different models in the development of a new, more extensive and complete one, having under analysis a wider range of variables, UTAUT seemed the best approach. Using this model as a guideline this research analyzes what managers think about CrM in terms of acceptance, intention and use: understanding if they accept it as a viable option, if intend to implement it and if they used, use or consider using it in the future, by evaluating what managers' think of CrM in terms of performance and potential, effort to develop and implement, their opinion regarding what the ones involved in the company environment would think about it and which conditions do they have, or don't have, that could facilitate the acceptance and use of this type of marketing.

This model, which integrates different variables analyzed by eight different models, to “assess the likelihood of success for new technology introductions and helps them understand the drivers of acceptance” (Venkatesh, et al., 2003, pp 426), consolidates numerous different variables into four core determinants that determine the degree of acceptance, intention and usage: performance expectancy, the degree to which the potential user believes the acceptance and use of this new tool will improve his or the company's performance, effort expectancy, which measures the perceived degree of easiness to use said tool, social influence, degree to which the individual perceive that relevant others think of the use of the new tool or system, and facilitating conditions, described as the degree to which the individual believes that the organization already has pre-existing conditions to facilitate the implementation of this new tool – figure 1 (Venkatesh, Morris, Davis and Davis, 2003). Even though in the original version proposed by Venkatesh, Morris, Davis and Davis, the authors linked these four constructs with four moderating factors: age, experience, gender and voluntariness of use (Alkhunaizan and Love, 2012), it was believed to be better not to considered them in this research due to the reduced size of the sample under analysis.

**Figure 1. UTAUT Model and the four variables**



Another reason why the UTAUT model was believed to be a good approach to analyze this topic was due to the linkage between the four variables and some of the factors addressed on the literature review. It is possible to examine and explore these variables, based on the previously existent work. Adapted to this particular concept of CrM the model variables have different parameters than the ones used to interpret the acceptance and usage of a new technology.

In this specific context: performance expectancy is contextually related to subject's interpretation on the potential of CrM, positive or negative, more specifically benefits or risks that can derive from the implementation of this type of marketing. Benefits such as enhancement of the company image, product promotion, increase of loyalty or growth of sales, and risks such as hurting the firm reputation, repelling effect on members non-supporters of the elected cause or reduction in the relatedness and affinity with the company are some of the factors expected to analyze under the performance expectancy variable.

The variable effort expectancy is, on the other hand, linked with the effort necessary to develop a campaign of CRM: the obstacles and barriers that managers and firms have to overcome in order to successfully implement this type of marketing will be stated and evaluated according to the perceived demanding effort. Considering the studies analyzed in the literature review, the main efforts to overcome are the pre-established skepticism and criticism towards CrM, the fact that is a difficult type of marketing to communicate and requires cautious planning and monitoring.

The variable social influence is directly connected to the opinion of everyone involved on the company's environment: costumers, shareholders or administrative and coworkers. On the literature review it was only possible to assess the possible feedback from the client about CrM, and the fact that this marketing tool usually improves employee's morale and benefits their opinion about the firm. More is expected to be explored in the conducted interviews concerning superiors and shareholders perception.

Lastly, the variable facilitating conditions is linked to all the conditions that can enable or simplify the effective implementation of CrM: a long-term approach, transparency and full commitment, are some examples of facilitation conditions mentioned on the literature review.

### **3. Methodology**

Considering the shortness of previous empirical researches on the field of CrM (Bennett, 2008), there is the need to develop exploratory studies with the intent to further understand manager's perspectives about this type of marketing. Following the example of a study conducted by File and Prince (1998), respondents were screened to be individuals responsible for marketing and/or decisions involving Corporate Social Responsibility within small, medium size or multinational enterprises. Enquiring managers of different size firms would be recommendable to assess the way they understand this type of campaign, regardless of the size of the firm. For that reason, six directors of marketing departments were contacted to be a part of this research and be interviewed in about this topic. For additional context, respondents were leaded to an established definition of CrM to assure consistency within the topic and more reliable results. The interviewees ranged from 32 to 52 years old, 66,6% woman and 33,3% male. The in-depth interviews were conducted on January 2019 through skype. None of the interviewees had any time restrictions and their duration varied from 25 to 58 minutes. All interviews were entirely recorded and transcribed, with the participants consent.

The interview questions (see appendix) were developed based on the Venkatesh, Morris, Davis and Davis (2003) approach on the subject but adapted to the topic under analysis: to evaluate marketing managers perspectives concerning the four main constructs of the UTAUT model. Questions aimed at understanding the performance expectancy that managers perceived of this marketing tool, at

assessing the effort expectancy associated with this marketing tool, and at interpreting marketers' perspective concerning the social influence of everyone involved on the trade process. Lastly there were questions whose purpose was understanding if the gathered conditions facilitated or hinder the implementation of CRM. It was expected the construct "social influence" to have a higher impact on acceptance and use of CrM, because of the social component of this marketing tool. The proposed model was meant at assessing the potential acceptance and use of CrM campaigns, evaluating what do managers think of this marketing tool expectancy regarding performance and effort, if and which facilitating conditions are considered prior to the implementation of CrM on the corporate environment and social influence of consumers, shareholders and employees.

#### **4. Analysis of the results**

Considering the proposed model, UTAUT, in-depth interviews analysis was conducted based on the four core determinants previously mentioned: performance and effort expectancy, social influence and facilitating conditions, with the final intent to measure the level of acceptance and usage of CrM.

##### Performance expectancy

As more common outcome from campaigns using CrM, participants stated several benefits for the company: the association to the idea that the firm is socially responsible and take on an active part on society matters, the consequent growth of the value of the brand, the increase of brand awareness, the improvement of the brands' image and reputation, differentiation from its competitors with more average positioning, and higher possibility of engagement with the brand from more supportive and loyal customers (Interviewee 1).

However, like everything, this marketing tool has its pros and cons, and presents numerous risks that might emerge if the cause is poorly chosen, one of the parts is in it for selfish purposes or dubious motives, or if the consumer perceives a CrM campaign as a "commercial maneuver" (Interviewee 3). This represents a bigger risk nowadays due to the size and reach of media, which can suspect, investigate and discover less altruist motives and rapidly leaks information as such, which will, consequently, have a massive impact on the brand's image. On this matter, Interviewee 2 demonstrated real concerns:

"Specially now, with the coverage, reach and easiness of spread, a campaign with a delicate topic can be a risk because one bad move and the media will blow bad news out of proportions very fast and in an uncontrollable way to hurt the company. We've seen this happen with several companies."

As more damaging risks for the company, the following were mentioned during the interview process: badly damage the firm's image and reputation, being perceived as fake and misinterpretation from consumers, seeing the adoption of CRM lead by exploitive and self-interest reasons. All these risks can develop a general disbelief and distrust against the company, which will lead to loss of loyalty, consumers and consequently, sales. Interviewee 6 noted

"From my perspective, one of the major risks is costumers understanding the campaign as exploitive and a trivialization of CrM"

Even though the Interviewee 6 is a firm believer that “consumers can notice when a brand is being authentic or fake and exploiting a cause to self-promote” this was not the general opinion that other interviewees expressed: they often mentioned the skepticism of consumers towards these types of associations when coming from companies, due to brands usually being concerned with their own goals. Interviewee 5 specified that “consumers don’t know to which extent brands are being genuine or not.”

All interviews admitted that if right set of conditions were gathered CrM has a massive potential (Interviewee 5) in terms of performance and can really elevate the company in the eyes of consumers and increase the company’s value. Obviously, none of the respondents identify this as the ideal type of marketing to implement when the goal is to quickly increase sales. Interviewee 6 acknowledge “If the goal was to increase sales, we had other ways, more immediate to achieve it, for instance to do a 60% off campaign.”

It was general agreed that managers engage in CrM for the qualitative factors instead of quantitative (Interviewee 6): the goal is to benefit the company in different ways than numbers, improving the firm’s image, corporate morale, affection towards the brand and/or product, preference over competitors, among other qualitative issues. Proving this statement Interviewee 5 affirmed that “what we are expecting - from a campaign like this - is reinforcement on loyalty and reputation levels.”

Even though increasing sales is not the main objective of companies when they choose to implement CrM, by participating in campaigns like this and concerning them about sustainability, this is always the ultimate goal for every company. Interviewee 4 confirmed that “We place social purpose before sales goals and at the same time by doing so, we reassure that sales are guaranteed.”

#### Effort expectancy

In terms of effort expectancy, only one of the participants had the opinion that CrM didn’t implied a lot of effort and classified this type of marketing as easy to implement, justifying her perception with the fact that, usually, the cause is glad to accept all help, which really facilitates the mediation process by removing the discussion of values out of consideration. According to Interviewee 6 “usually these campaigns are relatively easy to implement because normally we are dealing with causes or association with whom we don’t discuss values or negotiate with.” Also, interviewee 6 argues that CrM opens access and facilitates the implementation of campaigns with a heart. The company simply places the offer on the table, try to identify common aspects between the company and the cause and move forward, because for causes everything a company has to offer is more than welcome. Even regarding advertising and communication, interviewee 6 believes that this type of campaign simplifies the procedure: “Media corporations often want to advertise initiatives like this for free”.

The other five interviewees had the opposite opinion as they classify CrM as more complex, difficult and laborious, when in comparison with more traditional types of marketing, as implies more planning, controlling, delicate topics and legal and administrative issues. Interviewee 1 detailed, when asked about easiness of planning and implementation of a CrM campaign: “it’s way easier to place a commercial on tv or create a campaign for people to sample our products than to talk to the association and develop a partnership, and all these things have a lot of legal and administrative issues and take months to plan and execute.”



Even Interviewee 6, that characterized CrM as easy to implement, agreed that it demands the development of a full and complete evaluation not only of the plan but also of the cause as well, as it is necessary to comprehend every aspect involved concerning the cause: the vision, mission and values of the cause and everyone working on it, true intentions, motives and origins. Interviewee 3 shared the same concerns about the complexity and demanding analysis of the cause stating that "It's fundamental to understand who's working there, what's their records and history, as well as to do a little research and investigation to understand the seriousness and credibility of our potential partner. That's the reason why the managers advocate that this marketing tool demands a much bigger effort, especially in hours devoted to it, because it requires study, and an understanding of everything that needs to be done and how, alongside with a constant analysis".

Agreeing with the literature, all subjects interviewed agreed that a detailed monitoring of the process is decisive to the success of CRM because campaigns like this obligate firms to do a lot more of adjustments, even during the campaign, in order to reach a bigger impact and achieve the set goals. Considering the fact that CrM implies a serious commitment of everyone implicated, this is overall a more long, complicated and demanding method, especially when compared with more conventional types of marketing (Interviewee 5).

After conducting a campaign like this Interviewee 3 highlighted the need and importance of focus of the proposed campaign to the target audience, as she felt that, when she implemented a CrM strategy, it did not receive the expected adhesion, because the selected cause didn't feel close to consumers. Her and her colleagues felt that even though they defined the cause and explain the motives, consumers couldn't relate to it enough to care, contribute and take action. Interviewee 3 noted that "we explained which was the cause and who were we helping but the recipient was always too far away. And I got the impression that at least a lot of Portuguese still had that mindset that made them think: - they're trying to help someone in other continents or countries who we don't know, when there are so many people in need here".

When choosing the bigger challenge the participants couldn't reach an understanding: Interviewee 3 mentioned the choice of the cause, which implies an immense amount of research and careful commitment; Interviewee 6 elected the construction of a CrM plan for a long term and not a one-time thing, Interviewee 1 stated the correct communication of a campaign like this, every word matters in this context, Interviewee 4 choose the continuity, consistency and the fact that is long-term, for Interviewee 5 is to know to which extent do we have freedom to involve our partners during the development of campaigns as such, the margin that we have to communicate with and about them can be a challenge (especially when we are dealing with causes that have a lot of politics involved), and lastly Interviewee 2 nominated the bigger challenge the fact that as this concept is not very known maybe this type of mkt is difficult when compared to other types and more complex also because it's a concept very specific that deals with some skepticism already established and implicates a more thought, careful and rigorous implementation due to the fact that this is a very delicate and sensitive topic and can rapidly have a negative impact for the company. But overall, all respondents agreed that CrM has a lot of rules, barriers, things to look out for, and more than two also mentioned the choice of the cause and the coherence and consistency needed in CrM as big challenges to overcome.

### Social Influence

As almost every participant interviewed had already participated on a campaign of this kind, they already had feedback from previous campaigns regarding the opinion of others about CrM campaigns. Basically, all the answers to the questions concerning the opinion of consumers, shareholders or administration and coworkers about CRM started as "Assuming that..." followed by one, or more, of the facilitating conditions enumerated below for a campaign of this kind to succeed.

Except one interviewee, the other participants stated that they believed that in the eventuality of their company implement CrM, their target audience response would be extremely positive (Interviewee 6), or admitted expecting a good reaction (Interviewee 3), and not at all believe their consumers would perceive it as opportunism (Interviewee 2), mainly because the consumers are already aware of the values that the company stand up for and this wouldn't appear as something completely unrelated to the firm's' core. Interviewee 1, with a different perspective, expressed her concern "I think that, in some cases, costumers are already a little saturated with this type of campaigns because they - usually- don't believe in the good will of brands and companies, and very often aren't willing to pay more or chose that product over another just to give or contribute to something to someone they don't know" And she even added that "unfortunately, consumers are still very self-centered and prefer immediate discounts over these types of campaigns."

In addition, Interviewee 3 mentioned that, after the experience she had with CrM, they drifted apart from that specific model, not abandoning it completely, but stepping away from it because she and her colleagues got the impression that several consumers felt like the company could help with it own money, instead of demanding the contribution of the final consumer to help others. She stated "We felt that in this particular model (...) the number of consumers that interpreted these campaigns as 'if the brand wants to help the cause a, b or c it can, but not with my money' was increasing". Overall Interviewee 3 confess that she simply felt like "consumers expressed a better reaction if the brand helped directly". Moreover, this interviewee assumed to believe that because the firm is a multinational, consumers know that the company is financially capable financial and react differently than if it came from other companies, smaller in size and profit amount.

Regarding the opinion of shareholders or administration towards this type of campaign, all six interviews agreed. As the additional value of the brand is an increasingly concern of companies, more and more leaders are becoming extra aware and want their brands to be sustainable and helpful, not necessarily with a partnership with a cause but something full time that makes the difference (Interviewee 4) and they can realize the real advantages that CrM can have to the firm's image. Interviewee 1 and Interviewee 5, respectively, noted that "They really see this type of campaigns with very good eyes".

Regarding their co-workers, interviewees also concur that they would have a positive reaction toward CrM, justifying their opinion with the fact that we are all people and we all have an internal desire to do the right thing and make a different "They can understand how CrM can really value their assets and has several advantages that can represent to a company being permanently linked with solidarity purposes" or contribute to something bigger than us. Interviewee 4 mentioned that "At the end of the day they are consumers as well and live the same problems as other consumers."

Interviewee 2 even goes the extra mile and state that his coworkers would be excited to be a part of a campaign like this according to what he knows from them: their values, their education, themselves.

Expecting positive reaction from everyone involved in the process is extremely encouraging and can lead more companies to accept and use CRM, but obviously it is important that all the conditions to succeed are gathered and its better if the company implementing CrM is already known for their values and principles, as this facilitates the acceptance of the campaign as honest and helps to decrease the pre-existing skepticism.

#### Facilitating conditions

Practically as a general rule, every participant agreed that companies can truly benefit from CrM when planned, implemented and constantly monitored correctly, depending on the sector and assuming that the company, products, or brand, adopting CrM already have a certain level of affection or loyalty associated to it. Interviewee 3 declared regarding her previous involvement "In my experience, this type of toll works better for products with some level of attachment and loyalty."

In order to prevent the previously stated risks from happening and as a way to fight skepticism the interviewees identified several crucial conditions that would facilitate the planning and implementation and would increase the chances of successfully adopting CrM:

a) plan and implement a very consistent campaign on medium and long-term, because campaigns like this only work if the company really invests on it consistently and during a long period of time, for clients to understand that the company really cares and it's not simply another campaign. No repercussions will be felt on short-term (Interviewee 4). On this topic Interviewee 3 affirmed that "The result will depend on the consistency (...) as doing it once and neither repeating it, nor implementing an appropriate communication campaign will lead to a very small impact on short-term but in long-term the impact will be null". Thus, it is advised to study the possibility of implementing a campaign of this kind applied on medium or long-term, as there is no reason to engage in something like this to do once and for a short period (Interviewee 6);

b) choose a topic linked to the core of the company and try to innovate, but always supporting the elected first related topic. Consistency is extremely important for the consumer to develop the association between the brand and the cause (Interviewee 5);

c) have real and transparent relation with the cause, truly investing and devoting time and commitment to it. As Interviewee 6 and Interviewee 5, respectively, noted: "It's critical to have a genuine connection with the cause and continuity in the support ... I consider fundamental feeling and being completely committed to them".

d) believe on the cause and "everything about it" (Interviewee 4);

e) be careful not to make these campaigns something trivial and face them with the necessary seriousness (Interviewee 6);

f) choose an organization that is reliable, in order to prevent extra risks and damages related to this partnership. Interviewee 6 advised: "The elected cause should be believable and trustworthy, because we wouldn't want to associate with a cause that later on will generate a scandal or is exploiting the partnership for less noble causes".

g) select a cause that consumers value and its close to them and, more importantly, a cause that consumers can easily understand why the link with the organization. The fit between the cause and the company, as well as core values and vision are fundamental to decrease skepticism, make the campaign more believable

and trustworthy, and facilitate acceptance, comprehension, and support towards the association among both parties involved on consumers' minds. Interviewee 3 and Interviewee 6 mentioned that: "It is very important that congruence exists between the companies' and causes' objectives and values ... In order for CRM to work we need to have good affinity between the brand and the cause, something that connects well".

h) have a well-established partnership (Interviewee 1), where transparency, honesty and communication are crucial, and listen to everyone involved because it can really help adjusting and improving the plan (Interviewee 5);

i) lastly, because CrM campaigns are already predisposed to skepticism and critics and considering the, usually, delicate topics approached, develop a thoughtful and well defined communication strategy to assure no exploitation or misinterpretation from neither side. The way that the campaign is communicated and advertised can be determinant to its success, due to sensitivity and delicacy of the subject (Interviewee 4). In the same context, Interviewee 2 recommended: "To carefully control all publicity and communication regarding the campaign"

At the same time, to invest in communication so everyone knows what's being done and why (Interviewee 5) and value the follow up from everyone involved in the campaign: considering all perspectives will help to create a better campaign. Marketing Manager Beauty and Care at Unilever Fima, Interviewee 3 noted that: "the disbelief of consumers sometimes come from never seeing the realization of the help they provided and was promised. It's very important the before, the during and the after and sometimes brands forget (...) it's crucial to show the realization, the proof."

Aside to the essential conditions to succeed, marketers were questioned regarding the resources they believed were crucial to implement a CrM campaign. Only two types of resources were identified as necessary to develop a CRM campaign: human and financial, and every participant admitted that the company where they worked at had those resources available, even if it was necessary some adjustments. Still according to Interviewee 3: "it's necessary for people to relocate and focus the resources to do things that really matter"

Considering that this marketing tool requires hours of research and a constant monitoring, this would imply to have someone fully devoted to this project, because it involves a lot of conversations with the cause, numerous meetings with the administration and demands a full communication plan (Interviewee 1) so human resources are "the main resources needed" (Interviewee 3).

Interviewee 6 highlighted that more than available human resources, it's necessary people who are motivated and dedicated, trust, believe and cherish this type of initiative: "To be involved in these campaigns we need people who believe in this project and want to take it further with the right energy for the project to succeed and achieve the desired dimensions"

Additionally, financial resources are also mentioned as important but not crucial, as this type of campaign is not considered expensive. Interviewee 2 noted that "In my opinion, CrM is not very demanding in terms of monetary resources" Money is simply necessary to invest on advertising and other matters that might appear, because due to the fact that the established partnership is almost always with a non-profit organization or cause, this will imply that all cost fall on the responsibility of the company. "Usually causes don't have the resources, so the sponsorship, promotion and communication will all be a responsibility of the brand (Interviewee 1)".

Other factors that might be considered facilitating conditions are:

- the fact that there is an increasingly concern from consumers and brands regarding social responsibility, because this represents a reason for this type of marketing to be implemented and accepted more easily;
- the fact that managers and marketers are aware of what it takes to develop a campaign like this and are aware of the risks;
- and the fact that managers expect good responses from their target audience and have complete support from their supervisors to implement campaigns like this.

In order to better comprehend and consolidate the more relevant information withdrawal from the in-depth interviews on each of the four variables under analysis the following table was created (see Table 2).

**Table 2. Most common answers regarding each one of the four variables under analysis: performance expectancy, effort expectancy, social influence and facilitating conditions**

Variable under consideration	More relevant factors to consider in each variable		Number of respondents to mention the following factors
Performance expectancy	When planned, implemented and monitored correctly	Massive potential	6
		Improvement of the brand's image	6
		Increase of loyalty and affection for the company	4
		Increase of company - qualitative- value	5
		Differentiation from competitors	3
		Growth of sales in the long-term	4
	When not	Presents several serious risks for the company	6
		Can damage the company image	5
		Can lead to loss of clients and sales	6
Effort expectancy	Easy to implement		1
	More complex, difficult and laborious to implement		5
	More demanding than other traditional types of marketing		5
	CrM demands a detailed and carefull approach: planning, implementation and monitoring		6
	Full comittment from both parties involved is necessary		6
Social influence	Great feedback from shareholders and administration boards		6
	Positive opinion and willingness to help from coworkers		6
	Expectancy of good feedback from target audicence		5
Facilitating conditions	Honesty and transparency		6
	Consistency		5
	Long-term		6
	Fit/congruency between the company and the cause		6
	Election of a cause to which consumers feel close to		4
	Full comittment from both parties involved		6
	Human resources are the crucial component		6
	Low financial resources needed		4

## 5. Discussion

Consonant with the literature, marketers see the increasing importance of developing campaigns with a heart, linked with something that consumers feel close to. After analyzing the collected data it is safe to affirm that CrM is very well positioned in the mind of marketers. Using Venkatesh, Morris, Davis and Davis (2003) model, it is possible to confirm that this marketing tool is considered by managers. The data collected allowed us to infer that, except for the effort performance, all the other perspectives under study are used in the decision making process of managers, when developing a CrM campaign.

The idea that CrM campaigns involve a lot of effort, especially when comparing to other types of campaigns, can be regarded as the reason why this tool is not more used. In fact, even though managers realize the "massive potential" of this kind of marketing, expect incredible feedback of CrM from everyone in the company environment (shareholders and administration, coworkers and most importantly the target audience) and seem to have the resources and other factors to help implement this type of campaign, they tend not to invest more in it.

With the intent of responding the question regarding if the managers are aware of what to take into consideration when planning a CrM campaign, the information taken from the interviews indicate that managers do know which factors are crucial to conduct a successful CrM campaign. In conformity with evidence from previous studies (Bhattacharya, Sen 2004), the interviewees mentioned the same or similar factors: the importance of long-term, consistency, coherence and fit between cause and firm core values and lastly careful planning and monitoring of the process – campaign and ways to advertise it.

Regarding the performance expectancy it was clearly visible that the participants saw the numerous benefits that CrM presented. From an early stage it was relatively easy to understand that the performance expectancy would be one of the biggest drivers for the acceptance and user encouragement of CrM. Agreeing with the findings of other authors, cited on the literature review, interviewees mentioned as main advantages for the company: the association to the idea that the firm is socially, consequent growth of brand value, increase of brand awareness, improvement of the brands' image and reputation, higher possibility of engagement and loyalty, differentiation from its competitors and increase in the choice over its competitors.

Also further proving the validity of the studies analyzed in the LR, the conducted interviews allowed to access CrM in terms of facilitating conditions. All interviewees agreed that some financial resources are in fact needed but not in a greater amount, as this type of marketing is usually cheaper and implies less monetary investment. Mentioned as indispensable and crucial where human resources, people that truly believed and were excited with the campaign: to plan, implement, develop, monitor and evaluate it. In a general manner, applicants concluded that basically every company has the resources needed as long as there is will-power to create adjustments in case they're necessary. The relative easiness to possess the necessary resources, partnered with the expectance of positive outcome, the existent increasingly concerns from consumers and brands regarding social responsibility and confidence of managers on their knowledge to pull-off a CrM campaign, lead me to conclude that marketers have gathered all the

conditions necessary to facilitate the adoption of this type of marketing, which can incite the usage of CrM according to the model.

Even though in the literature several authors described the majority of consumers as very skeptic and critic (Kim, Lee 2009), most respondents acknowledge that possibility and risk as features to overcome, but also believed that in the event of their company implement a CrM campaign, said campaign would be well received and accepted by consumers, coworkers and shareholders, because they trust that they know what it takes to succeed, how to avoid the obstacles and prevent the risks. This perspective regarding the opinion of orders allows concluding that the social influence, in this case, will facilitate the acceptance of CRM, according to the UTAUT Model.

Described by both, well-known published authors and the respondents inquired for this research, as not the easiest type of marketing to implement and communicate, the expected effort associated to CrM is high, especially when compared with other types of marketing, which will difficult the acceptance and resulting usage of this marketing tool. The majority of the interviewees characterized CrM as challenging to plan, considering all the variables, risks and obstacles involved. They classified it as very complex and demanding, implying constant updates, monitoring and control to prevent damages to the company.

In order to respond the main research question of this study, regarding what managers think about CrM: we can determine that managers think highly of CrM, see an amazing potential on this marketing tool and are fully aware of both benefits and risks of it, as well as elements needed to implement a CrM campaign. However, in terms of effort necessary to overcome the skepticism, critics, risks and obstacles this type of marketing loses points.

Was noticed that marketers mentioned a lot more the importance of doing good, participating in initiatives, organizing campaigns with good values and positive messages or contributing in another ways, etc., instead of strictly partnering with a cause, demanding the intervention of the client on the process to donate something. One of the interviewees even doubted the worthiness of CrM, advocating that the importance of adapting and meeting costumers' expectations towards corporate social responsibility doesn't strictly imply a partnership with a cause – and the risks involved – merely implies commitment from the company to be sustainable, support causes or initiatives and do good. Marketers consider crucial for a brand to care, to be sustainable and to support what it truly believes but something more as “adopting a stand to contribute to a sustainable ecosystem” as a way to adapt and remain relevant, “it has to be something that the company is, not something that the company does” (Interviewee 4).

## **6. Conclusions**

Mainly used to improve the image that consumers have about the company, change consumer behavior toward the brand and increase the loyalty between consumers and brands, CrM also presents several obstacles that can interfere with the success of it: challenging and complex planning and implementation, risk of consumers interpreting this type of marketing as exploitive from the causes' side, which can hurt the firm's reputation and the possibility of being linked to a determined cause that later on will damage the company's' image.

The purpose of this research was to discover managers perspectives about CrM: what managers think about it, if they are aware of the existence of CRM as a marketing tool, what do they think about the potential success of CrM campaigns, if they know which are the required elements to implement this type of marketing tool and which advantages might result from this implementation and which are the factors they consider obstacles or barriers when considering the adoption of CrM and which they consider relevant to succeed.

Based on the UTAUT model the main findings of this study show that in terms of performance expectancy and social influence, CrM is easily accepted by marketers, which will increase the probability of use, alongside with the admitted existing facilitating conditions. Unfortunately, in terms of effort expectancy, managers believe that the effort that CrM implies is high which will decrease the level of acceptance of CrM and consequently diminish the its probability of usage.

After examining the research, is possible to affirm, based on the conducted interviews, not only are marketers aware of this marketing tool as they are very well informed regarding it: they know the risks, the obstacles, the advantages and potential, as well as what are the criteria to adopt to successfully implement a CrM campaign. And even though they all see potential, admit having the necessary resources and presume they would have a positive reply from their company environment, they assumed being currently on campaigns also linked with values, socially responsible or sustainable and without ruling CrM out as a possibility, don't see the need to be linked to a specific cause to show to their audience that they care.

#### Theoretical contributions

Building on the literature review, managers comprehend the tremendous potential of CrM, assuming that when all the conditions to succeed are carefully followed, this type of marketing can truly benefit everyone involved: the company, the cause and the final consumer.

Interviewees mentioned the importance of congruence between the values defended by the firm and the cause, with the intent to facilitate the consumers' association and comprehension of this created link, which sustain the numerous studies and researched that exist highlighting the importance of fit between the cause and the company.

This research also showed that marketers might attribute more value to the act of a corporation being socially responsible than restrictively to establish a partnership with a cause. Due to the already mentioned increasing concern from consumers to be more socially involved, there are now several marketing types that help companies to improve their image and reputation, increasing loyalty and brand affection, that might not present as many difficulties and effort for managers.

In terms of the variables analyzed, even though CrM is perceived as complex and challenging regarding the effort expectancy, is also perceived has extremely beneficial and socially accepted – when the conditions, previously mentioned, are met. This indicates that in terms of acceptance, the effort expectancy is the only variable that difficult the acceptance and consequential usage. If the effort would be less, this would conduct to more companies implementing CrM as a marketing strategy.

#### Managerial contributions

As attentions are currently focused on firms, to comprehend their social impact, is very important that managers, or marketers, before implementing a CrM



strategy, really think about the impact that they intend to achieve with this marketing tool in the long-run, and, accordingly, define a detailed plan to do so.

As formerly indicated is vital that marketers know how to do it, in order to prevent the risks and negative impact that can originate from CrM. To succeed using CRM, this must be thought always in a long-term perspective, be transparent and trustworthy, both implementation and communication strategy should be carefully planned and analyzed, and the elected cause should be cautiously chosen, preferentially completely aligned with the company's core values, due to the impact that will reflect on the brand.

Considering that, of the four variables under analysis on this topic, to evaluated the acceptance and usage of CrM – performance expectancy, effort expectancy, social influence and facilitating conditions, managers principal issue with CrM lies on the effort perceived to develop a campaign of this kind, it seemed relevant to advise that this type of marketing might increase in worth if the client really appreciates the campaign and understand it not as the company only contributing if the client purchases anything, but as the company having interest in involving him the process, motivating him and facilitating the act of giving for the final consumer.

#### Limitations

The present study faced several limitations that affected the data interpretation and that, therefore, should be taken into consideration. On a first instance is important to mention the subjectivity of the theme under analysis. As this study is based on interviewees' personal opinion, the results will vary according to the interviewed individuals and common ground was found but not regarding every aspect. Second, the reduced size of the sample didn't allow a representative analysis of the population. Third, this study was conducted only based on Portuguese marketers, which implies that the reached findings might not be applied to different cultures, due to cultural differences. Forth, and lastly, the demographic characteristics of participants, especially in terms of age and gender – considering that the majority of interviewees were female-, do not possess a wider range in scope to generalize the findings to the population.

#### Future research guidelines

After conducting this study, several guidelines for future research emerged as they seemed interesting and relevant to contribute to the development of this under-explored subject of CrM, from the perspective of marketers. Due to the first and second limitations mentioned above this wasn't a viable option in the present research, but it would be valuable to explore how genders and age influence perspectives about CrM: changing their stand, claims and concerns.

Another distinct approach on this topic would be to analyze the different opinions of marketers according to the several types of companies. Apprehend if size, profit, employee number and brand recognition are variables that influence marketers' opinions, as well as to comprehend the impact of each variable.

Still from managers perspectives, and as well from consumers' point of view, it would be noteworthy to understand if the opinion regarding CrM differ from B2B to B2C companies, and if so, how and why.

Lastly it would be beneficial to compare CrM with other types of marketing also based on Corporate Social Responsibility, its impacts on consumers and regarding usage and acceptance from managers. The purpose would be to apprehend if in comparison other types of marketing, these can provide the same advantages without the potential risks of CrM.

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## **APPENDIX**

### Interview template

Dear Participant, I am, at the present mean, collecting data for the University Católica Portuguesa, Católica Porto Business School, on CRM: from the firm perspective. My purpose is to collect data and information that allows to analyze the topic under the corporation view. All the collected information will be used exclusively for research purposes and will be used anonymously and released in aggregated terms, unless the firm explicitly authorize it. With this study I intend to gather information to better understand what managers think about the type of marketing under analysis: analyzing the degree of acceptance and usage of CrM. I acknowledge and thank you cordially for your support and availability to help and underline that every participant can intervene with any question or concern that seems appropriate. In case you have some doubt regarding this project please communicate at the time of the interview or later, by email.

1. Are you familiarized with the concept of CRM is?
2. Tell me, in your own words what is CRM.
3. Do you ever work with this type of marketing?
4. If yes, what did you thought about it?
5. If yes, mention, in case they existed the problem(s) your firm faced when implemented this type of marketing.
6. If not, do you think that the company where you currently work would benefit from a campaign like this? And why?
7. What is the potential you see on this marketing tool? (performance expectancy)
8. What do you think is the most common outcome for a CRM campaign? (performance expectancy)
9. What benefits do you believe, the implementation of CrM, might have for the company? (performance expectancy)
10. Which, do you believe, are the downsides or risks of CrM? (performance expectancy)
11. Which, do you believe, are the bigger barriers or obstacles of CrM? (performance and effort expectancy)
12. According to your perspective on the subject which do you believe are the factors that contribute the most for the success of a CrM campaign? (performance expectancy)
13. As a marketing manager, what do you think about this type of marketing in terms of planning? (effort expectancy)
14. And implementation? (effort expectancy)
15. What do you believe is your potential consumers opinion regarding CRM? (social influence)
16. How do you believe your target audience would respond to a CrM campaign? (social influence)
17. What do you believe would be your shareholders opinion if your company adopted this marketing tool? (social influence)
18. And regarding your coworkers? What do you think would be their feedback? (social influence)
19. Are you informed about which are the required resources to implement this type of marketing tool? (facilitating conditions)
20. Considering your marketing department, does your company have the necessary resources to implement this type of campaign? (facilitating conditions)