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**The Perception of Customer
Relationship Management
Adoption
Case of Mobile Companies in
Saudi Arabia**

Authors

**Amine Nehari Talet,
Mazen Harbi Shawosh
and Saeed A. Al-Saeed**

King Fahd University of
Petroleum & Minerals,
Dhahran, Saudi Arabia

Abstract

The purpose of this study is to ascertain customer satisfaction perception of Customer Relationship

Management (CRM)
adoption by mobile telecom
companies in Saudi Arabia.
This study surveys more
than 440 mobile telecom
customers to investigate

their opinion about the quality of offered customer services by mobile telecom companies and its impact on customer satisfaction and hence customer. The

study concentrates on the main three channels used by mobile companies to provide customer services (customer service offices, phone operator and web

site services). Empirical findings present evidence that the quality of customer service significantly affect customer satisfaction and thus customer loyalty. It is

found that the majority of customers preferred to use phone operator than office customer services.

Keywords: Customer Relationship Management (CRM), Customer Satisfaction, Customer loyalty.

Introduction

In today's globalised and borderless market, quality, productivity and satisfaction of customers

pose a challenge for the survival and growth of all firms. These growth and survival demands are further expanded by the need to attract and retain

loyal customers. The management recognizes that customers are the spirit of a business and that a company's success depends on effectively

managing relationships with them. Thus, the customer is the main focus for any successful business. Business success depends on a firm's understanding

and meeting customers' needs and demands. Today, often, the objectives become constraints for businesses and their employees when they do

not have appropriate tools, equipment, or methods to achieve this goal. Since the last two decades, the telecommunications sector has become a vital key area

for the economic development of nations. The telecommunication industry's role in an economy cannot be underemphasized. This is

because it is the means through which all daily transactions and activities are undertaken. It aids decision making, organizing, influencing,

activating, instructing,
providing feedback,
promoting interpersonal
and business relationships
as well as exchange of
information. All social,

economic, political, cultural,
trade and commercial
activities are undertaken
using telecommunication.
One important service in an
economy is

telecommunication. The nature of a country's telecommunication industry affects its pace of commercial and domestic activities. Due to the poor

performance of many of these telecommunication firms, particularly in the developing countries, governments have had to intervene.

It is well known that it costs more for organizations to attract new customers compared to retaining existing ones (Hsieh, 2009). Also, the role 80/20

indicates that you make an eighty percent benefit from a twenty percent customer (Galitsky, & de la Rosa, 2011). With this in mind, information technologies

(IT) can be used to establish strong and profitable long-term relationships with customers.

(Babu, & Kumar, 2010; Agrawal, & Berg, 2009; Hsieh, 2009). This means that by creating long-term relationship with loyal customers, you will ensure

long-term success
(Boohene, & Agyapong,
2011; Kuusik, & Varblane,
2009).

Long- term relationships can be attained by delivering the right products and services to customers. The delivery of these products and services

and the means used for this delivery are also important (Hsieh, 2009). Changing to customer-centric means that organizations must build up ways of gathering

data about customers and obtain the needed tools to satisfy the desires of their customers (Mendoza et al., 2007). Customers' preferences and

perceptions are changing
(Agrawal, & Berg, 2009);
and customers are the ones
who initiate transactions
(Babu, & Kumar, 2010).
Customers' awareness

increased due to several factors including IT development and boundless competition from all around the world (Kuusik, & Varblane, 2009).

CRM becomes more and more important to organizations with fierce competition over customers (Mendoza et al., 2007). CRM helps

organizations understand their customers' requirements, and it is considered a tool for improving the competitive advantage (Lin et al, 2010;

Agrawal, & Berg, 2009) and to enhance innovation capabilities (Lin et al., 2010). CRM also helps organizations become more effective and efficient when

dealing with customers
(Beldi et al., 2010). With
CRM, organizations can
increase profitability and
also boost customer loyalty

and satisfaction (Pezeshki et al., 2009).

Nowadays, technology provides businesses with systems that can help

companies track customer interaction with firms and allow employees to quickly retrieve all information about the customers. This concept is called a

customer relationship management (CRM) system and if used properly, it could enhance a company's ability to achieve the ultimate goal of retaining

customers and so gain a strategic advantage over its competitors.

Literature Review

Customer loyalty has been found in literature to be a competitive tool for many companies. This is even

much more pronounced in today's highly globalised, industrialized and competitive markets. The growth and survival of companies depend on how

loyal their customers are of which telecommunication is no exception. Various studies have been carried out in the developed countries regarding

customer loyalty (Ndubusi et al, 2007; Khatibi et al., 2002; Uncles et al 2003). However, only few studies have been carried out in this area in the developing

world, especially in the telecom sub-sector.

Lack of practical tools and methodologies, which guarantee managers a

better consideration of customer needs and expectations, can avoid the misuse of scarce available resources.

The concept of the vendors-customers relationships, named "relationship marketing", has evolved from the idea that there is a variety of customer

relationships ranging from transactional to relational dealings. Today, most companies seek to create total or cumulative customer satisfaction as

opposed to transaction-specific customer satisfaction. Customer satisfaction and the quality of customer service are particularly considered

significant in building
trustworthy relationships
with customers and
retaining the competitive
advantage. As a result,
customer relationship

management (CRM) systems and customer experience management (CEM) have become a must-have set of tools and techniques in the past

decade. Sophisticated organizations worldwide rely on specialized CRM software systems to accumulate and analyze

customer-focused
information.

IT is an enabler for
enhanced customer
relationships in various

ways-- it gives firms the ability to deploy strategies by customizing individual customer relationships utilizing customer databases, interactive and

mass customization
technologies (Verhoef and
Donkers, 2001).

CRM was principally
evolved by marketing

(Kotler, 1997) and was started by a deep analysis of consumer behavior. As the concept of CRM matures, CRM definitions also change to reflect

evolutions to CRM. Some of CRM definitions come from technological perspective while others come from business perspective.

CRM from Business Perspective

CRM refers to activities that manufacturers practice for understanding customer

demands and improving customer satisfaction (Aggarwal, 1997). CRM involves acquisition, analysis and use of knowledge about

customers in order to sell more goods or services and to do it more efficiently. Oracle Corporation on the other hand refers to CRM as about knowing your

customers better and effectively using that knowledge to own their total experience with your business and to drive revenue growth and

profitability. Others defines CRM as a management approach that involves identifying, attracting, developing and maintaining successful customer

relationships over time in order to increase retention of profitable customers (Bradshaw and Brash, 2001; Massey et al., 2001). Also, Sin et al. (2005) refers

to CRM as utilizing extensive strategies and engineering to find, obtain and cultivate advantaged customers, and hence maintain long-term

partnerships. Likewise, CRM is defined as a process/application that permits organizations to gather and analyze customer data rapidly

while seeking to improve customer loyalty via targeted products and services (Rigby et al., 2002). Similarly, Swift (2001) defines it as a

process designed to collect data related to customers, to grasp features of customers and to apply those features in particular marketing activities.

Winer (2001) considers CRM a set of strategies and tools aimed at retaining customers over time instead of attracting new ones. It needs some basic

components, from a database to basic analyses to be developed on it, from decisions about customers. In fact, he considered that one of the research

priorities in the CRM field is the development of metrics that enable the managers to know to what extent CRM programs are working. However, Bose, (2002)

refers to CRM as to involve acquisition, analysis and use of knowledge about customers in order to sell more goods or services and to do it more effectively,

and CRM as a revolving process in which firms interact with their customers thereby generating, aggregating and analyzing customer data

and employing the results for service and marketing activities (Schoder and Madeja, 2004).

In marketing literature, CRM has been placed in the overall context of marketing thought and especially that of relationship marketing

strategies as “an ongoing process that involves the development and leveraging of market intelligence for the purpose of building and maintaining

a profit-maximizing portfolio of customer relationships" (Zablah et al., 2004).

While technology is a key enabler, it is only a means to an end and most authors view CRM as a combination of strategy and information systems focusing

company's' attention on customers in order to serve them better (Chan, 2005).

CRM is aimed at unifying the potential of relationship

marketing strategies and IT to create profitable, long-term relationships with customers and other key stakeholders. Furthermore, CRM provides enhanced

opportunities to use data and information to understand customers and correlation value with them. This requires a cross-functional integration of

processes, people,
operations and marketing
capabilities that is enabled
through information,
technology and
applications (Payne and

Frow, 2005). Others saw CRM as a complex set of interactive processes that aims to achieve an optimum balance between corporate investments and

fulfilling customer needs in order to generate maximum profit. (Ragnar, Lutz and Walter, 2007)

Strategically, CRM views customer relationships as an investment that will contribute to the enterprise's bottom line. Customer relationships'

design and management are aimed at strengthening an enterprise's competitive position by increasing customers loyalty. While this extends beyond the use

of IT, IT is still an important enabler of modern CRM (Ragnar, et al, 2007).

CRM as a philosophy:
authors taking up this

approach consider CRM to be a complex strategy involving all the corporate organizing structure in order to strengthen the relationship with the client;

they avoid considering CRM only as an instrument of data collection. So, they all agree that CRM is a corporate strategy and a systematic approach based

on relational marketing
that has the aim to select
and manage clients in order
to optimize their value in
the long run and to,
consequently, maximize

value creation for the
enterprise (Valsecchi and
Rangone, 2007).

CRM from Technological Perspective

CRM can be interpreted as an integration of technologies and business

processes used to satisfy the needs of a customer during any given interaction. Also, CRM is basically an enterprise-wide integration of

technologies working together such as data warehouse, web site and intranet/extranet, phone support systems, accounting, sales,

marketing and production (Bose, 2002). Nguyen et al. (2007) interpreted CRM as a process of digitizing a staff's knowledge about their customers.

Precise customer data is an essential input to successful CRM performance (Abbott et al., 2001) and, therefore, technology plays an important role in CRM in

adding to organization intelligence (Boyle, 2004). In fact, amazing advances in IT provide organizations with the tools to collect, store, analyze and share

customer information in ways that greatly improve their capability to respond to the needs of individual customers and hence to attract and retain

customers (Butler, 2000).
The approach of one-to-one
relationships, customer-
value analysis and mass
customization (Hart, 1995)
are now part of the reality

through unparalleled
advances in IT,
transforming the
traditional approach to
CRM to an integrated web-
enabled approach,

equipped by tools such as customer information systems, automation of customer support processes and call centers (Ghodeswar, 2001). CRM

calls for “information-intensive strategies” which utilize computer technologies in establishing relationships, improving existing technology and

thoroughly linking
technology positioning to
desired business initiatives
(Harding et al. 2004).
Computer technologies
such as computer-aided

design/manufacturing,
flexible manufacturing
systems, just-in-time
production databases, data
warehouses, data mining
and CRM software systems

enable organizations to deliver greater customization with better quality at lower cost. It also helps staff at all contact points serve customers

better. Many customer-centric activities would be impossible without appropriate technology (Leo, 2005).

Telecommunications Sector in Saudi Arabia

Mobile communications
markets can be divided by
the type of services

provided and by the
telecommunications
networks used for
'production into the sub-
markets for cellular
radiotelephony, paging,

trunked mobile radio
access and satellite services
and networks (Gerpott,
1998, Knauer, 1998).

Saudi Arabian telecommunications sector is considered one of the biggest in the Middle East and North Africa (MENA) region. Saudi Arabia has

four mobile
telecommunication
companies. They are, Saudi
Telecommunication
Company (STC), Mobily,
Zain and Bravo. Saudi

Arabia

Telecommunications

Report (2011), published
by Business Monitor

International, shows that
the number of mobile

phone subscribers in 2008 was 35,593,000 subscriptions, compared to 44,800,000 subscriptions in 2009. The report also forecasts the number of

mobile subscriptions for the next five years, where it is expected to reach around 60,349,000 subscriptions in 2015. The report also provides the market share

of each mobile company in the Kingdom. STC's market share for the 3rd quarter of 2010 is around 43%, Mobily's share is 41%, Zain with market share of

around 15%, and Bravo only contributes with 5% to the Saudi mobile market share.

The telecom market in Saudi Arabia is growing rapidly. In fact, mobile companies' revenues have been increasing as a cumulative average rate of

15% annually, growing from SR 19.8 billion (US\$ 5.28 billion) in 2001 to SR 52.5 billion (US \$14 billion) in 2009. Mobile services revenues represent about

77% of the total telecom market revenues in Saudi Arabia.

History

Saudi Arabia privatized telecom section in 1998. Then later in 2001, Saudi government, in preparation

for opening the telecom market for competition, established the regulation authority for the telecom sector market and called it Communication and

Information Technology Commission (CITC). Saudi Arabia opened its telecom market for competition in 2005. The second mobile telecom service provider,

Etihad Etisalat (Mobily),
was licensed to work in
Saudi Arabia. Two years
later, the third mobile
company Zain was licensed.
Telecom section in Saudi

Arabia consists of three distinctive services: fixed telephone service, mobile phone service and internet services.

Mobile Sector

Mobile customers have grown from less than 20 million customers in 2005 to 42 million customers in

2009 representing a 43% annual growth. In 2007 only (when the 3rd mobile service started), a total of 8.72 million customers were added to the market

which represents the largest growth in one year throughout Saudi telecom history. The total number of mobile subscriptions grew to around 53.3 million

by end of Q1 2011, with penetration stood at 191%. Prepaid subscriptions constitute the majority (87%) of all mobile subscriptions, in line with

the trend in other similar
markets around the world.(
CITC 2011)

Fixed Line Sector

Fixed telephone lines have grown on a steady basis from 3.2 million lines in 2001 to 4.52 million in

2011 in which 3.34 million lines (73 %) are residential lines. This represents a household teledensity of around 67%, while the population teledensity is

around 15.9% or 159
telephone lines for every
1000 inhabitants. (CITC
2011)

Internet Services

On the other hand, internet users in Saudi Arabia have increased from just 1 million in 2001 to nearly 13

million in 2011. This represents a cumulative average growth rate of about 33% per year. Internet penetration is estimated at 46% of

population in 2011. This rapid growth of the number of users is attributed to dramatic declining in computer prices, internet access prices in addition to

increased awareness of the public and the increase of local contents in Arabic language and the availability of eServices

such as E-Banking. (CITC
2011).

Broadband Service

A. Fixed Broadband

subscriptions including the (DSL) subscriptions, Fixed Wireless (Wimax)

subscriptions and other fixed lines have grown to around 2.13 million subscriptions at the end of 9M 2011. The Fixed Broadband penetration

rate stood at around 30.6 %
of household at the end of
9M 2011.

The liberalization of the
telecom sector and the

resulting competition in the market has led to remarkable benefits for the Saudi economy at large and for the consumers in particular, such as better

quality services, improved customer care, more consumer choices and lower prices. While the cost of living index continued to rise in the last few years

due to increased prices of most of its components, the prices progressively decreased (CITC 2011).

B. Mobile Broadband The total subscriptions to mobile broadband reached 11.5 million at the end of 9M 2011, representing a penetration of 40.5% of the

population. The mobile broadband market continues to gain momentum in the Kingdom and is becoming an increasingly exciting

market. One of the key reasons for this growth is the fact that due to competition and the huge expansion of the smart phones which enable

customers for varieties of data packages. Becoming easier to access via mobile devices such as smart phones, mobile networks are also improving as 3.5G

(HSPA) continues to be deployed and wireless broadband technologies (4G) emerge over the next few years. (CITC 2011).

Improving Customer Services in Saudi Market

Since the start of competition in 2005, customers of telecom

services in Saudi noticed great improvement in the level of services provided by Saudi Telecom Company (STC). STC also worked hard to improve its

customer services level to compete in the market.

Because STC inherited most of its employees from the governmental sector, it was very challenging to change

its culture from a government style to a profit-oriented organization. The company had to go over several strategic shifts to

incorporate customer satisfaction into its internal culture. Yet, our study shows that there is more to do to improve customer satisfaction.

Research Methodology

Sample

A questionnaire was distributed to 600

individuals and also published online. For the hard copy questionnaire, a cover letter explaining the purpose of the study was enclosed. For the online

version, the letter was placed in the first page of the questionnaire. Out of the distributed ones, 90 were received; 80 of them being usable in addition to

361 completed online surveys out of 480 online attempts. The total number of usable questionnaires for analysis is 441 surveys.

Data Collection

We accept the fact that not all relevant variables can be studied simultaneously and/or controlled precisely.

We also understand that our assumption may allow us to notice some relevance and may also prevent us from noticing others.

In order to confirm that selected variables for this study are relevant to respondents (mobile telecom customers in Saudi Arabia), a pilot study has

been conducted before finalizing the questionnaire.

The final developed questionnaire is divided into four parts. The first

part contains demographic questions such as gender, age and education level.

The second part contains general information about respondent's mobile

service usage. The third part measures respondent's usage and satisfaction about mobile services as well as customer service channels. The last part

assesses overall customer satisfaction and loyalty. Some of these variables are selected from previous studies.

The constructs in the questionnaire use a five point Likert-type scale where 1=strongly agree, and 5 strongly disagree.

Reliability Analysis

The construct is tested against the scale reliability function on SPSS 19.0 using the Cronbach's Alpha in

order to evaluate the internal consistency of the studies constructs. Cronbach's Alpha coefficient value for the first construct is 0.898 and

for the second construct is 0.806. Both values exceeded 0.7 suggested by Nunnally (1975). The coefficient values suggest that both constructs are

internally consistent and
reliable.

Research Variables

*Customer Satisfaction
Construct*

a) Independent Variables

To compute the first independent variable, respondents were asked to

express their opinion on the following factors using a five point scale:

- The ease and speed of getting connected to the

support phone operator
(X1).

- The level of operator
attitude (X2).

- Knowledge of operator (X3).
- The speed of operator in providing problem solution (X4).

- The follow up action on unresolved problems (X5).
- The ease of site navigation (X6).

- The responsiveness of web site (X7).
- The site availability and problem free (X8).

- The ease and speed of reaching one of office customer support staff (X9).

- Knowledge of office support staff(X10).
- How good the office staff in following up problems

that need further action (X11).

- How serious and professional the service

provider is in handling complaints (X12).

- Responsiveness of the service provider to complaints (X13).

- Speed of resolving reported issues/problems (X14).
- Overall staff good knowledge about

reported
issues/problems (X15).

An aggregate score for
perceived service quality
was computed from the

above 15 factors and
labeled as XServQual for
consequent analysts.

b) Dependent Variable

The dependent variable of this construct is overall satisfaction with mobile service provider.

Customer Loyalty Construct

***a) Independent
Variables***

- Overall satisfaction with customer call center (X1).
- Overall satisfaction with customer service Office (X2).

- How service provider strives to gain high customer satisfaction (X3)

- Overall satisfaction with this service provider (X4)

An aggregate score for customer satisfaction was computed based on the

above 4 factors and labeled
as XOverallSatis for
consequent analysts.

b) Dependent Variable

The dependent variable of this construct is customer loyalty to their mobile service provider.

Research Results and Discussion

In this part of the analysis, we discuss demographic

information of the respondents. Table no. 1 shows that about 89.3% are males. Ages ranged from below 18 to 64 years where 40% are between 25 and

34 years old and 39% are between 18-24 years old. 14% of participants' ages are between 35 and 44 years old. From educational perspective, more than

66% of participants hold BS degree. 16% hold higher education degree and 15.9% hold high school degree. On the other hand,

90% of participants are
Saudi citizens.

Table 1: Demographic Details

**Please See Table 1 in Full
PDF Version**

Participant's Mobile Carrier Distribution

As detailed in table 2, among participants, 61% are customers of Saudi

Telecom Company,
whereas 32.8% are Mobily
customers. Zain customers
are estimated at 6.12% of
participants. This
distribution suggests that

STC serves about 61% of mobile customers in Saudi Arabia, Mobily serves about 33% of customers in Saudi Arabia and Zain serves the rest. From plan type

perspective, among STC participated customers, 77.3% are postpaid plan customers and the rest are prepaid plan customers. Mobile customers in

contrast consist of 72.4% postpaid customers and the rest are prepaid. As to Zain customers, there are 52% postpaid while 48% are prepaid. Telecom

companies regard postpaid customers as long-term relationship customers, whereas prepaid customers as short term ones. However, prepaid

customers yield highest profits due to the nature of prepaid plan prices where they tend to be more expensive with expiry dates. Companies fight to

attract postpaid customers as they provide stable and predictable income source for companies. On the other hand, Communications and Information Technology

Commission (IITC) - Saudi communications authority- allows customers to transfer their mobile service numbers to any of the two mobile telecom

companies in the Saudi Market. It is worth mentioning that the survey shows that customers to recent established companies have prepaid

plans compared to well-established companies. For instance, 77.3% of STC customers who participated in the survey

were postpaid compared to
51.9% of Zain customers.

Table 2: Participant's Mobile Carriers

**Please See Table 2 in Full
PDF Version**

Participants Geographical Distribution

Survey participants are distributed across major Saudi Arabian regions.

Table 3 shows about 47% per cent are from central region where country capital, Riyadh, is situated. 40% are from eastern region and 7.5% from the

western region. The rest is different places including people currently out of Saudi Arabia such as students.

Table 3: Participants Geographical Distribution

**Please See Table 3 in Full
PDF Version**

Customers Preference of Service Channels Provided by Mobile Companies

Table 4 shows customer's preferences of available

channels to request services and/or modify services. More than 70% of customers across the entire mobile companies call company operator for

service- related issues or requests. Also, 40% of STC customers, 44% of Mobily customers and only 14% of Zain customers call into the automated service to get

desired service. About 41% of STC customers, 44% of Mobily customers and 48% of Zain customers use company web site to get desired service.

Percentages of customers using different channels are quite similar across all companies except in Zain self-service.

Table 4: Customers Loyalty and Satisfaction

**Please See Table 4 in Full
PDF Version**

Mobile Companies Performance

As seen in our study,
providing quality customer
service leads to customer

satisfaction. Satisfaction in turn leads to customer loyalty. In other words, quality customer service leads to customer loyalty and hopefully customer

retention. Customer Relationship Management (CRM) plays a vital role in interacting with customers. Ten questions are included to measure customers'

satisfaction and loyalty. The following table shows the average rates for each company from customer satisfaction and loyalty perspectives. Table 4 shows

customer satisfaction and customer loyalty for the three mobile telecom companies in Saudi Arabia. Numbers are generated by assigning a 5 scale

measure-- 5 for strongly agree, 4 for agree, 3 for neutral, 2 for disagree and 1 for strongly disagree. All customer evaluation scores are added together for each

factor and then divided by the number of participants of each company to get average customer responses for each company. Standard

deviation is calculated for both indicators and all have reasonable variation.

Mobily, for instance, scores a higher average customer satisfaction rate (3.52 out

of 5) and also a high customer loyalty rate as well (3.4 out of 5). Zain comes in the second position with 3.8 out of 5 for customer satisfaction

and 3.23 out of 5 for customer loyalty. STC comes in the last position with 2.66 out of 5 for customer satisfaction and

2.41 out of 5 for customer loyalty.

To measure customer perception about companies CRM

performance (table 5), we developed a formula to calculate average customer evaluation for CRM implementation in each mobile telecom company

based on the last question
in our survey (How do you
evaluate the overall
customer relationship
management carried out by
your mobile service

provider?). This question has 3 choice-answer-- excellent, fair and poor. Each of the three companies got 3 points for each excellent rating, 2 for

each fair rating and 1 for each poor rating. We then added ratings for each company and then divided the total points by the number of participants for

each company and represented the ratio in percentage value in the table. Standard deviation is calculated to ensure reasonable variation. Also,

table no. 5 shows percentages of customers' ratings for each mobile telecom company. For instance, 50% of Mobily customers rated Mobily as

excellent in CRM whereas
only 11.9% of STC
customers rated it as
excellent in CRM.

Table 5: Customers Overall Rating for CRM

**Please See Table 5 in Full
PDF Version**

Conclusion

The results for this study show that perceived quality of service for customer service channels offered by

mobile telecom companies in Saudi Arabia yield the most influence to customer satisfaction. Furthermore, we have seen that improvement of such

customer service provides the highest customer satisfaction in return. CRM certainly plays a major role in providing required information to customers

through phone in a timely manner and helps to track customer concerns to maximize satisfaction levels. Also, improving customer services should

lead to customer loyalty.
Since customer loyalty is
influenced by customer
satisfaction variation, there
are other factors that might
affect customer loyalty

beyond customer satisfaction factor. This might be an interesting subject to address in further studies. A further study needs to be carried

out to investigate root causes according to service provider perspective such as CRM implementation, internal processes and related factors. Also, it

might be interesting to find out the reason why would Mobily for instance outperform STC who has been in the market for much longer time and with

much more capabilities and yet, in a few years Mobily was able to capture a considerable percentage of market share.

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