

Customer Success Management: The next evolution in customer management practice? [☆]

Bryson Hilton^{a,*}, Bitahajihashemi^b, Conor M. Henderson^a, Robert W. Palmatier^b

^a Lundquist College of Business, University of Oregon, USA

^b Foster School of Business, University of Washington, USA

ARTICLE INFO

Keywords:

Customer success management
Customer success manager
Learning management
Stakeholder management
Goal management
Relationship marketing

ABSTRACT

Customer Success Management (CSM) has transcended from a buzzword into the latest permutation in customer management practice and accordingly deserves rigorous academic analysis. The current article aims to accelerate such analysis through three steps. First, the article examines the broader customer management literature and situates CSM in a larger tradition following Customer Relationship Management, Customer Experience design and management, and Customer Engagement. Second, the article examines the initial articulations of CSM in the literature. Third, the article draws upon goal management, stakeholder management, and learning management in hopes to provoke original research questions and management experimentation. Altogether we provide evidence that CSM forefronts the customer as the primary actor supported by the seller, rather than the seller acting upon the customer, and discuss implications for organizational design and customer facing operations.

1. Introduction

Recently, the practice of Customer Success Management (CSM) has exploded in popularity. Fewer than 5000 individuals held the “Customer Success Manager” job title in 2015, yet over 30,000 individuals claimed the job title in 2018 (Gainsight, 2019). LinkedIn ranked “Customer Success Manager” as the 6th most promising job role on LinkedIn for 2019 (Pattabiraman, 2019). Marketing practitioners and consultants have launched popular CSM practitioner conferences, CSM digital tools and technology platforms, a CSM book and CSM business press publications (Arona, 2016; Mehta, 2019; Mehta, Steinman, & Murphy, 2016; Murphy, 2019). Despite the newfound popularity of CSM, academic research is just beginning to wrestle with defining CSM and articulating a research plan. Given that CSM has yet to receive considerable academic attention, a skeptical researcher is left to wonder whether CSM is just the latest management fad, or a valuable innovation in customer management practice. In response, we first examine CSM as part of a natural evolution of customer management practices following Customer Relationship Management (CRM), Customer Experience design and management, and Customer Engagement. In doing so, we prompt scholars to question whether CSM represents the next evolution in customer management practice. Second, we

review the initial articulations of CSM in the literature and examine how CSM continues to innovate upon the foundation of CRM, Customer Experience, and Customer Engagement. Lastly, we draw upon several research streams in order to generate fresh insights into CSM's potential effect upon customers' lifetime value.

Consider the rise of CRM, Customer Experience, Customer Engagement, and CSM in the popular press (i.e., press releases and news articles). While academic publications provide similar coverage of CRM, Customer Experience, and Customer Engagement, coverage of CSM in academic publications is found wanting (See Fig. 1). A ratio analysis of the academic press to the popular press for the keywords “Customer Relationship Management,” “Customer Experience,” and “Customer Engagement” reveals an average ratio of 2.85:1000 from the years 1995 to 2019. If applying that same ratio to the keyword “Customer Success”, there ought to be 179 academic articles that refer to “Customer Success.” Instead, at the time of this writing, there are only seven academic articles that refer to “Customer Success.” Of those seven, only Hochstein, Rangarajan, Mehta, and Kocher's (2020) editorial and two *Harvard Business Review* articles (Porter & Heppelmann, 2015; Zoltners, Sinha, & Lorimer, 2019) address the potential for CSM to represent an innovation in marketing practice.

The respective growth of academic articles referring to CRM,

[☆] The author team thanks the SAMS Institute for supporting this research and providing industry connections to discuss the ideas in this manuscript.

* Corresponding author.

E-mail addresses: brysonh@uoregon.edu (B. Hilton), bitaha@uw.edu (B. Hajihashemi), conorh@uoregon.edu (C.M. Henderson), palmatrw@uw.edu (R.W. Palmatier).

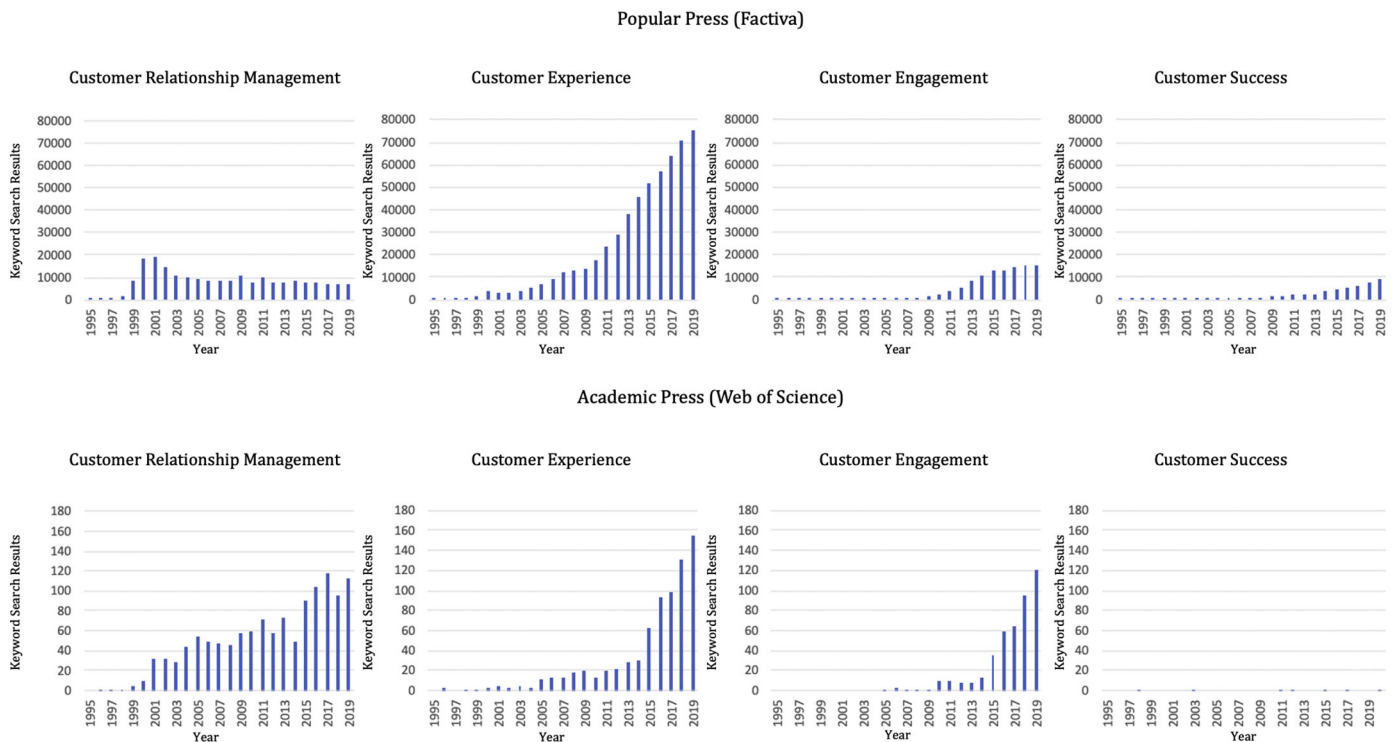


Fig. 1. Customer Management practice keyword search results by year in Popular Press and Academic Press. Source/Method: *Factiva*: Factiva is a global news and press release search engine. Keyword searches include free text search for a phrase match of the respective keywords listed above each popular press graphs. *Web of Science*: Web of science is an academic journal search engine. Keyword searches include abstract and title searches among all journals for a phrase match of the respective keywords listed above each academic press graph.

Customer Experience, and Customer Engagement suggests a continuing evolution in both customer management practice and scholarship (See Fig. 1). In the literature, scholars have linked CRM, Customer Experience, and Customer Engagement together as concepts that build on and support one another (Bowden, 2009; Grewal, Roggeveen, Sisodia, & Nordfält, 2017; Palmer, 2010; Payne & Frow, 2005; Roy, Padmavathy, Balaji, & Sivakumar, 2012; Sigala, 2018). Foundationally, CRM provides a system of record or database for tracking customer data. By tracking customer data, CRM enables firms to view the entire customer journey and implement Customer Experience management and design. By implementing Customer Experience management and design, firms receive fresh insights for implementing Customer Engagement; and both Customer Experience and Customer Engagement self-reinforce and magnify each other. Although conceptualizing CRM, Customer Experience, and Customer Engagement as an evolution of customer management practice seems plausible, conceptualizing CSM as the next evolution of customer management practice deserves further scrutiny. On the one hand, if CSM is simply a management fad or rebranding of existing customer management practices, then CSM may not represent a true innovation in marketing practice. On the other hand, if CSM represents a true departure from or uniquely innovates upon traditional customer management practices, then CSM warrants further academic scholarship.

Initial articulations of CSM provide examples where CSM ranges from small iterations on customer management practices to a radical reimagining of customer management practices at the organizational level (Hochstein et al., 2020; Porter & Heppelmann, 2015; Zoltners et al., 2019). CSM can represent small shifts in embedding customer centric language and culture throughout an organization with few changes to operations or practice. These shifts focus on a narrow, local version of CSM in which the seller wants to make sure the customer fully utilizes the seller's offerings. On the more dramatic end, CSM represents the act of imbuing an agent/fiduciary orientation to customer management in industries that typically have a more arms-length

relationship. In a fiduciary or agency type relationship, the seller concerns itself with proactively leading customers beyond simply utilizing the narrow offering provided by the seller. A redesign of organizational elements can enable this vision of CSM to be fully realized (Porter & Heppelmann, 2015). Altogether, CSMs manifestation along a continuum of smaller innovations to more radical departures may cause confusion among scholars considering how to situate CSM within the broader customer management practice landscape. On the one hand, a less radical form of CSM may appear too synonymous with more traditional customer management practices. On the other hand, a more radical form of CSM may appear too divergent from traditional customer management practices. Scholarship has yet to empirically identify drivers and consequences of firms adopting a more or less radical implementation of CSM.

In sum, this article considers whether CSM is an existing concept by a new name or a genuine step forward in customer management philosophy, theory, and practice. We organize the remaining sections around three main objectives. First, we examine claims that CSM is a genuine response to shifts in the technological and business landscape similar to prior innovations in customer management. Second, we examine initial articulations of CSM in the literature to identify how CSM innovates upon or departs from CRM, Customer Experience, and Customer Engagement. Third, we draw upon goal management, learning management, and stakeholder management research streams in order to generate original research questions and encourage managerial experimentation in CSM implementation.

2. An evolution of customer management practices

2.1. Customer relationship management

CRM refers to relationship marketing efforts informed by a customer database that tracks customer interactions with the selling firm over time and across all touch points. Commoditized database technology

enabled CRM to flourish in the late 1990's by enabling small and mid-size firms to track customers' demographic and transactional data. Initial articulations for CRM first appear in the *Long Range Planning*, where Stone, Woodcock, and Wilson (1996) describe research on the use of information technology to manage customer relationships. The most cited article on CRM appears in the *Journal of Marketing Research*, in which Reinartz, Krafft, and Hoyer (2004) conceptualize, operationalize, and validate CRM processes and dimensions as a construct, and then empirically investigate implementation of CRM. Throughout the literature, definitions of CRM vary but tend to broadly match with Reinartz et al.'s (2004) definition of CRM as “a systematic process to manage customer relationship initiation, maintenance, and termination across all customer contact points in order to maximize the value of the relationship portfolio” (p. 294). CRM data has allowed researchers to discover the return on various relationship investments for driving retention, expansion, and enhanced customer value (Chen & Popovich, 2003; Mithas, Krishnan, & Fornell, 2005; Payne & Frow, 2005; Verhoef, 2003).

2.2. Customer experience

Customer Experience refers to the evaluation and design of the customer journey as the set of customer experiences and reactions to the selling firm's offerings and touchpoints (Fornell, Rust, & Dekimpe, 2010; Grönroos, 2011; Lam, Shankar, Erramilli, & Murthy, 2004; Oliver, 1997). Customer Experience builds on the foundation of CRM; customer touchpoint data enables product and service design teams to measure customers' reactions and reactively improve products and services. Initial articulations for Customer Experience first appear in the *Journal of Retailing* where authors Mittal and Lassar (1996) detail how personalization influences customer experience. The most cited article on Customer Experience appears in the *Marketing Science*, where authors Novak, Hoffman, and Yung (2000) conceptualize skill, control, arousal, and other factors as key determinants of a positive customer experience in online environments. For Customer Experience, each transaction is part of a larger social exchange relationship where firms dynamically adapt interactions with customers over the course of the customer relationship lifecycle (Ekici, 2013; Kim, Steinhoff, & Palmatier, 2020; Richards & Jones, 2008).

2.3. Customer engagement

Customer Engagement seeks to “motivate, empower, and measure customer contributions to marketing functions” above and beyond simple purchase and use (Harmeling, Moffett, Arnold, & Carlson, 2017, p. 312). Customer Engagement arose in response to the rise of social media, which enabled firms to more easily measure ancillary behaviors such as word of mouth, and customers' feedback. Initial articulations of Customer Engagement first appear in *Isa Transactions* where author Alsup (1993) provides an analysis of the customer engagement process. The most cited article on Customer Engagement appears in the *Journal of Service Research*. Here, authors Van Doorn et al. (2010) develop the concept of customer engagement behaviors. Customer Engagement aims to build and strengthen customer-firm relationships and achieve subsequent benefits such as increased customer loyalty and retention (Purcărea, 2018; So, King, Sparks, & Wang, 2016). Customer Engagement research includes broad points of engagement such as (1) cognitive, (2) emotional, (3) behavioral, and (4) social elements (Vivek, Beatty, Dalela, & Morgan, 2014).

Altogether, we conceptualize CRM, Customer Experience, and Customer Engagement as an evolution in customer management practice in response to shifts in technology and business environment landscapes (Harmeling et al., 2017; Novak et al., 2000; Stone et al., 1996). Similarly, popular press and scholars identify CSM as a response to technology and environmental shifts in the software industry (Porter & Heppelmann, 2015; Zoltners et al., 2019; Hochstein et al., 2020) (see

Table 1).

2.4. Customer success management

Technology and environmental shifts that inspired CSM include (1) zero-cost distribution, which motivates sellers to increase market offerings and (2) utilization based billing, which motivates buyers to initiate trial without incurring sunk cost bias. Altogether, the net effect trend is that buyers' dependence on sellers is decreasing. Buyers' decreasing dependence provokes sellers to better align with customers' value-in-use. More recent technology shifts enabling ubiquitous sensors and compute power improve firms' ability to measure customers' value-in-use, and predict and model customers' behavior. While value-in-use may refer to customers' determination of experiential benefits (e.g., satisfaction) or customers' engagement with the product (e.g., loyalty), value-in-use may go further by referring to customers' determination of financial, social, operational and strategic value (Aarikka-Stenroos & Jaakkola, 2012; Lapierre, 1997; Smith & Colgate, 2007; Woodall, 2003). CSM draws on the foundation of CRM by considering customers' demographic and transactional data but goes further by utilizing streaming sensor data and other unstructured customer data to derive value-in-use insights and predict customers' future value-in-use. CSM draws on a foundation of Customer Experience by seeking to improve customers' product experience, but CSM goes further by prioritizing customers' more distant financial, social, operational, and strategic goals. CSM draws on a foundation of Customer Engagement by considering customers' loyalty but goes further by prioritizing customers' goal achievement over engagement behavior. For example, while Customer Engagement could be tasked with promoting content in order to increase users' time spent in an app, CSM would be tasked with limiting users' counterproductive screen time.

Altogether, skeptics of CSM may still question whether CSM represents an evolution in customer management practice that better services customers' value-in-use. In response, we detail the initial articulations of CSM in the literature and explore whether CSM innovates upon or departs from CRM, Customer Experience, and Customer Engagement in service of customers' value-in-use.

The initial articulation of Customer Success first appears in *Industrial Marketing Management* where authors Fawcett and Cooper (1998) analyse how logistics performance measurement influences customer success. Fawcett and Cooper (1998) find that customer success is derived through compulsive performance measurement efforts. At the time of this writing, there are only seven academic articles that refer to “Customer Success”. Of those seven, only Hochstein et al. (2020) editorial address CSM as a new marketing practice. An outside search reveals two *Harvard Business Review* articles that also refer to CSM as a new marketing practice (Porter & Heppelmann, 2015; Zoltners et al., 2019). Altogether, each CSM article introduces CSM within operational, theoretical, philosophical, and managerial perspectives (See Table 2).

Operationally, Porter and Heppelmann (2015), and Hochstein et al. (2020) respectively define CSM as (1) “responsible for managing the customer experience and ensuring that customers get the most from the product” (p. 17), and (2) “the proactive (versus reactive) relational engagement of customers to ensure the value potential of product offerings is realized by the customer” (p. 3). Altogether, Porter and Heppelmann (2015) and Hochstein et al. (2020) task CSM with uniting Customer Experience and Customer Engagement toward proactively maximizing customers' value-in-use. The authors' emphasis on proactively maximizing customers' value-in-use denotes that CSM continually leads customers toward the widest range of value-in-use by considering customers' financial, social, operational and strategic value. For example, Customer Experience or Customer Engagement alone may only consider customers' localized perceptions of product value by measuring customers' satisfaction and loyalty. However, by proactively maximizing customers' value-in-use, CSM represents the act of imbuing

Table 1
Evolution of customer management practices.

Constructs	Business & Technological Impetus	Firm Response	Examples	Related Papers
<i>Customer Relationship Management (CRM):</i> Systematic relationship marketing efforts informed by a customer database that tracks customer interactions with the selling firm across all touch points over the relationship lifecycle in order to maximize the value of the customer portfolio.				
	<ul style="list-style-type: none"> Commoditized database technology enables every firm to track customers' demographic, and transactional data. 	<ul style="list-style-type: none"> Firms are enabled to use customer demographic and transactional data at customer touchpoints. Firms are enabled to build relationship marketing and loyalty programs on top of CRM databases. 	<ul style="list-style-type: none"> Salesforce introduces CRM software that can be used in a web browser. SugarCRM introduces open source CRM software. 	<p>Stone et al. (1996); Chen and Popovich (2003); Verhoef (2003); Reinartz et al. (2004); Mithas et al. (2005); Payne and Frow (2005)</p>
<i>Customer Experience:</i> Evaluation and design of the customer journey as the set of customer experiences and reactions to the selling firm's offering and touchpoints.				
	<ul style="list-style-type: none"> Customer touchpoint data is made available to product and service design teams. Improved software enables firms to measure customers' satisfaction, and view the customers' journey. 	<ul style="list-style-type: none"> Product and service designers use touchpoint data to improve products and services. Product and service designers deploy satisfaction surveys to measure customers' satisfaction along the customer journey. 	<ul style="list-style-type: none"> BMW Corporate designs customer journey touchpoints by analyzing dealerships' sales and service satisfaction scores. UnderArmour uses a panel of 10,000 athletes to test satisfaction with new clothing technology. 	<p>Mittal and Lassar (1996); Oliver (1997); Novak et al. (2000); Lam et al. (2004); Richards and Jones (2008); Fornell et al. (2010); Grönroos (2011); Ekici (2013); Kim et al. (2020)</p>
<i>Customer Engagement:</i> Developing engaged customers who exhibit physical, cognitive and emotional customer contributions beyond customer transactions.				
	<ul style="list-style-type: none"> Rise of social media enables firms to measure ancillary behaviors such as word of mouth, usage, and customers' feedback. Improved software enables firms to measure customers' sentiment and directly collaborate with customers. 	<ul style="list-style-type: none"> Firms use ancillary behavior data to inform product design and service choices. Firms transition away from one way messaging toward two-way conversations with advocates, neutral parties, and detractors. 	<ul style="list-style-type: none"> YouTube implements new algorithm to consider "watch time" as a key indicator for surfacing videos to viewers. TikTok provides creators video creation tools that increase time spent in app. 	<p>Alsup (1993); Van Doorn et al. (2010); Henderson, Steinhoff, and Palmatier (2014); So et al. (2016); Harmeling et al. (2017); Purcărea (2018)</p>
<i>Customer Success Management:</i> Proactively prioritizing customers' experience and engagement toward maximum value-in-use.				
	<ul style="list-style-type: none"> Increasing trend toward ecommerce, zero cost distribution, and utilization based billing decrease customers' dependence and sunk cost biases. Ubiquity of sensors and compute power enable firms to more closely measure customers' value-in-use, and predict and model customers' behavior. 	<ul style="list-style-type: none"> Product and service designers match customers' goal pursuits with appropriate goal means. Firms build on a foundation of customer experience and engagement to prioritize customers' goal achievement. 	<ul style="list-style-type: none"> Google surfaces direct answers in search results in order to help users answer questions more quickly and easily. ABB Robotics enables customers to remotely monitor and adjust industrial machines. 	<p>Porter and Heppelmann (2015); Zoltners et al. (2019); Hochstein et al. (2020)</p>

Table 2
Initial articulations of customer success management.

	Hochstein et al.	Zoltners et al.	Porter et al.
Operational definition	"The proactive (versus reactive) relational engagement of customers to ensure the value potential of product offerings is realized by the customer" (p. 3)	None offered.	1) "Responsible for managing the customer experience and ensuring that customers get the most from the product" (p. 17). 2) "Takes charge of the ongoing customer relationship and ensures that customers gain maximum value from the product" (p. 15).
Theoretical discussion	1) Service-sales ambidexterity: Service and sales people are tasked with customers' success.	None offered.	None offered.
Philosophical discussion	2) Modularity: Customer Success Manager is a specific job role. Hunter, Builder, and Farmer metaphors are used for describing job roles. CSM is tasked with "building" customers' value-in-use.	Mindset shift: "Instead of 'win the customer', the focus has shifted to "show the customer the path to value" (para. 10)	None offered.
Managerial discussion	1) All job roles are responsible for customers' success. 2) Customer Success Manager is a distinct job role that coordinates customers' value-in-use among stakeholder groups. 3) CSM differs from service and sales roles by advocating for the customer. 4) CSM utilizes leading key performance indicators (e.g. customer health scores) versus lagging key performance indicators (e.g. satisfaction and loyalty).	1) Some firms are rebranding customer service and account managers as Customer Success Managers while other firms creating differentiating Customer Success Managers from service/sales roles by truly focusing on customers' success. 2) Customer Success Managers are advocates for the customer instead of their firm. Firms need to create culture and incentives for Customer Success Managers to advocate for the customer. 3) Customer Success Managers are trusted advisers who coordinate resources and stakeholders toward customers' success.	1) CSM unit "assumes primary responsibility for customer relationships after the sale" (p. 17). 2) CSM is a distinct business unit that "performs roles that traditional sales and service organizations are not equipped for and don't have incentives to adopt: monitoring product use and performance data to gauge the value customers capture and identifying ways to increase it" (p. 17) 3) CSM coordinates marketing, sales, and service toward customers' value-in-use.

an agent or fiduciary orientation to customer management even in industries that typically have a more arms-length relationship. In a fiduciary or agency type relationship, the seller concerns itself with customers' broader value-in-use beyond simply utilizing the narrow offering provided by the seller.

Theoretically, Hochstein et al. (2020) introduce service-sales ambidexterity, and modularity as a basis for considering how to implement CSM within an organization. On the one hand, service-sales ambidexterity suggest that all job roles ought to consider customers' value-in-use. However, many job roles are not incentivized to consider customers' broader value-in-use. For example, while Customer Experience and Customer Engagement managers may be asked to consider customers' broader value-in-use, their narrower focus incentivizes reactive support, satisfaction scores, ex ante voice of the customer, and billing and upsells over customers' financial, social, operational, and strategic success. On the other hand, modularity suggests that job roles ought to be partitioned, with some job roles solely focused on CSM. Modularity enables CSM to innovate upon Customer Experience and Customer Engagement by incentivizing (1) proactive customer intervention as opposed to reactive customer support, (2) customers' broader outcomes as opposed to more local satisfaction, (3) ex post customer value versus ex ante voice of the customer, and (4) customers' growth rather than billing and upsells.

Philosophically, Zoltners et al. (2019) suggest CSM represents a mindset shift where instead of winning the customer, customers are shown the path to value. Hochstein et al. (2020) articulate a set of metaphors for situating CSM. Hochstein et al. (2020) describe firms who use hunter/builder/farmer metaphors for describing job roles within sales management (hunters), CSM (builders), and account management (farmers). While salespeople “hunt” for new clients, account managers “farm” existing clients through customer support and billing. CSM is tasked with “building” customers' value-in-use. The “builder” metaphor differentiates CSM from Customer Experience and Customer Engagement by forefronting the customer as the primary actor striving to achieve its own value-in-use rather than adopting the traditional customer management narrative with the seller as the primary actor offering something that the customer engages with and experiences. For example, whereas relationship marketing research traditionally only controls for customer firm size and growth, CSM is at least jointly responsible for the customers' growth.

Managerially, the CSM articles provide discussion for organizational structure, job role definitions, and corresponding key performance indicators. Organizationally, CSM often manifests as a new functional unit in a selling firm's organizational structure that unites marketing, sales, and support functions (Porter & Heppelmann, 2015). Across all CSM structural approaches, the objective is interoperability of diverse resources toward the customer's goal achievement (Hochstein et al., 2020; Zoltners et al., 2019). Customer success managers are embedded at integration points where customers utilize the selling firm's resources. By focusing on integration points, customer success managers seek to overcome customer obstacles by exposing and hopefully alleviating, any competing objectives that exist among stakeholders. Or in other words, CSM organizational structures are designed to go further than traditional Customer Experience and Customer Engagement by leveraging broad stakeholder groups toward customers' success.

For example, Porter and Heppelmann (2015) task CSM with performing roles “that traditional sales and service organizations are not equipped for and don't have incentives to adopt: monitoring product use and performance data to gauge the value customers capture and identifying ways to increase it” (2015, p. 17). Zoltners et al. (2019) find that while some firms may mislabel non-CSM job roles as CSM, true CSM advocates for the customer and guides the customer to value. Hochstein et al. (2020) suggest that service and sales roles are more focused on sales, efficiency, and customer satisfaction, whereas CSM is focused on stakeholder management in service of customers' value-in-use. Altogether, CSM job roles are differentiated from job roles more

often associated with Customer Experience and Customer Engagement (e.g., sales, account management, support) by prioritizing stakeholder management toward customers' value-in-use.

Hochstein et al. (2020) find fault with traditional key performance indicators since they represent lagging indicators such as satisfaction and loyalty. Instead, Hochstein et al. (2020) describe CSM as a departure from Customer Experience and Customer Engagement by relying on leading indicators that not only represent the customers' current value-in-use, but also predict customers' future value-in-use. Similarly, Porter and Heppelmann (2015) and Zoltners et al. (2019) advocate for CSM to focus on metrics that are in service of customers' value-in-use. Altogether, CSM departs from traditional customer management key performance indicators toward a new set of key performance indicators focused on customers' current and predicted value-in-use.

In sum, the initial articulations of CSM provide evidence that CSM evolves from and innovates upon traditional CRM, Customer Experience, and Customer Engagement in service of customers' value-in-use. Despite the evidence, skeptical scholars may be concerned with CSM's lack of empirical grounding, questioning whether or not CSM's emphasis on maximizing value-in-use improves customer lifetime value. Consider Twilio. At the time of the programable communication cloud platform's successful 2016 initial public offering, its revenue doubled from the prior year due to the explosive growth of its key customers, Uber, Airbnb, and WhatsApp (Lynley, 2016). However, Twilio experienced an unexpected revenue deceleration in 2017 when Uber, which had accounted for 17% of Twilio's revenue, decided to reduce its utilization of Twilio's tools (Yeung, 2017). Assuming that Uber achieved value-in-use through Twilio's offering, one would expect Uber to become long-term customer. However, Twilio experienced the opposite: Uber's account contraction and the threat of Uber's complete departure. This case challenges the idea that CSM represents a true innovation for customer lifetime value.

In response, we draw upon goal management, learning management, and stakeholder management research streams in order to generate fresh insights into CSM's potential effect upon customers' lifetime value. We explore each research stream by identifying theories, empirical findings, or strategic recommendations that prompt CSM to innovate upon or depart from traditional customer management practices.

3. Foundational research streams of customer success management

In academic literature the use of “success” in abstracts and titles is growing in popularity. While only 5561 journal articles referred to the keyword “success” in 1995, over 32,883 journal articles referred to the keyword “success” in 2019. Various “success” word pairs are also growing in popularity. Popular “success” word pairs include “success factors,” “project success,” “competitive success,” “product success,” “innovation success,” “information system success,” “marketing success,” “export success,” and “alliance success”.

The use of success with different word pairs denotes that success is used to describe a variety of context dependent goal pursuits. For example, success in an export context may be vastly different from success in an innovation context. Even within a specific success context, a definition of success may have different assumptions. Consider the term “product success.” For one person, the term “product success” may conjure up visions of a product that obtains a certain market share. For another person, the term “product success” may conjure up visions of high user involvement, even if certain market share targets are never obtained (Cooper & Kleinschmidt, 1987). Therefore, one may surmise that customers' success is defined by the goals that buyers and sellers co-create together. In response, we draw upon Goal Management as a foundational CSM research stream.

3.1. Goal management

Goal management refers to strategies that promote customers' goal achievement. Consider the customer who is freshly adopting a new goal. Goal management research suggests that when goal-pursuit begins, positive emotions increase effort toward goal-achievement while negative emotions decrease effort toward goal-achievement. Therefore, sellers may conclude that high customer satisfaction and loyalty scores, as a proxy of positive emotions, are a sign that customers will increase effort toward goal achievement. However, as goal achievement nears, positive emotions decrease effort toward goal-achievement while negative emotions increase effort toward goal achievement (Louro, Pieters, & Zeelenberg, 2007). Therefore, as goal achievement nears, prioritizing traditional Customer Experience and Engagement indicators (e.g., satisfaction and loyalty) may counterintuitively derail customers' goal achievement. However, a form of CSM that prioritizes customers' goal achievement may depart from traditional customer management practices by provoking negative emotions as a means to increase customers' effort closer to the goal.

Consider the Twilio example introduced earlier. If Uber achieved value-in-use with Twilio's offering then value-in-use appears to counterintuitively lead to customer attrition and account contraction. Therefore, scholars may conclude that customers' value-in-use, absent dependence, is unlikely to promote customer lifetime value. However, goal management research suggests another idea; that when focal goal achievement becomes a certainty, effort toward the focal goal is abandoned and redirected to other goals (Louro et al., 2007). Therefore, when traditional customer management practices only consider a narrow, local version of value-in-use, they may counterintuitively provoke customers to prioritize other goal pursuits. When customers shift effort toward other goals, they may discover new offerings that improve upon or eliminate the need for the sellers' existing offerings. However, a form of CSM that prioritizes customers' goal achievement may build upon traditional customer management practices by using customers' goal achievement as an impetus to start aiding the customers' next goal pursuit.

Other theories within goal-management research streams may provide further implications for how goal linking contributes to customers' lifetime value. For example, goal systems theory postulates that goals are structurally linked to each other and the awareness of the means to achieve those goals. Another aspect of goal systems theory is that persistence in goal pursuit requires connection to positive affective feedback and consistent presence of linked concepts. Empirical work has shown that stable and attainable goal definitions, clearly linked to means of goal achievement, improve commitment to sustained goal pursuit (Harackiewicz, Barron, Pintrich, Elliot, & Thrash, 2002; Kruglanski et al., 2002). Altogether, goal system theory suggests that CSM may need to (1) help shape the cognitive representation of customer goals to reside at the level at which the selling firm can provide the means for achievement and (2) help customers link lower level goals and goal-means to higher level goal achievement.

In sum, on the one hand, goal management research streams encourage scholars to reconsider how traditional customer management practices may counterintuitively contribute to a contraction in customers' lifetime value. On the other hand, goal management research streams provoke scholars to consider how CSM may innovate upon or even depart from traditional customer management practices in order to prioritize (1) customers' goal achievement and (2) customers' broader financial, social, operational and strategic value-in-use, in service of customers lifetime value.

3.2. Stakeholder management

By considering customers' proximal and distal goals, CSM may not only be tasked with managing customers' focal stakeholders, but also with managing customers' broad actor networks. For example, Porter

and Heppelmann (2015) and Hochstein et al. (2020) task CSM with coordinating stakeholder groups toward maximizing customers' value in-use. In response, we draw upon Stakeholder Management as a foundational CSM research stream.

Stakeholder management refers to the “necessity for an organization to manage the relationships with its specific stakeholder groups in an action-oriented way” (Freeman, 1984, p. 53). The tradition of stakeholder management draws upon stakeholder theory to view any one entity's actions through the impact it has on the rest of their relational ecosystem, and to motivate the co-production of mutual benefits throughout all stakeholder groups (Henderson & Palmatier, 2011; Reypens, Lievens, & Blazevic, 2016). In relation to CSM, stakeholder management refers to understanding and managing relationships not only with the customer but also the customer's stakeholder groups. CSM coordinates goal pursuit across stakeholder groups by (1) surfacing diverse stakeholder goals, (2) aligning stakeholder goals or prioritizing competing and non-reconcilable goals, and (3) integrating stakeholder resources toward the achievement of those goals. Stakeholder theory, social capital theory, and network theory inform how goal pursuit coordination practices can attenuate principal-agent problems, promulgate resource integration, and diffuse knowledge.

As stakeholder constituents are identified, relationships determined, and stakeholder goals defined, alignment challenges may occur. Consider Amazon Web Services (AWS). AWS is the main infrastructure for several streaming media competitors (e.g., Netflix, Hulu, Prime Video). One must wonder exactly how AWS delivers CSM to a group of firms competing for limited marketshare. CSM skeptics may suggest that the best AWS can do is focus on Customer Experience.

Tensions prove salient for CSM managers seeking to serve diverse stakeholder groups equally. Donaldson and Preston (1995) suggest that stakeholder management requires “simultaneous attention to the legitimate interests of all appropriate stakeholders” (p. 67). Seeking the interest of all stakeholders introduces a dilemma for CSM managers since stakeholder groups enact conflicting agendas and are in long-term relationships that are neither purely transactional nor hierarchical (Thorelli, 1986). A potential resolution or insight for managing these conflicts is found in studies of long-term family groups. Epp and Price (2011) propose “a shift in managerial thinking from individual to customer network satisfaction,” so that “customer networks are not simply an aggregation of individual goals, but instead a dynamic interplay of individual, relational, and collective goals” (p. 47). From family group data, Epp and Price (2011, p. 44) find that tension between conflicting goals is resolved through four strategies – (1) prioritization: giving precedence to some goals over others, (2) symbiotic activity: interacting with the same offerings but through alternate activities, (3) parallel activity: participating in the same activities but with limited direct interaction from the whole group, and (4) partition: breaking the group apart into coalitions that focus on separate goals.

For AWS, a fiduciary-form of CSM may manifest through (1) partition: CSM creates modular teams that focus on and advocate for their own respective clients, or (2) prioritization: CSM advocates for and prioritizes one customer's market share position. However, for AWS, a non-fiduciary-form of CSM may manifest through (1) symbiotic activity: CSM serves all customers equally without regard for customers' competitive concerns, or (2) parallel activity: CSM provides all customers a set of tools and resources with little to no direction.

Altogether, stakeholder management tasks CSM with customers' success from a network perspective rather than from solely an individual perspective. CSM utilizes both a fiduciary-form, and a non-fiduciary form of CSM to maximize customers value-in-use. On the one hand, an analysis of customer stakeholder networks may reveal that a non-fiduciary-form of CSM is the best strategy for maximizing customers value-in-use. For example, Ebay sellers bring their own resources to bear in a competitive online auction environment. On the other hand, an analysis of customer stakeholder networks may reveal that a fiduciary-form of CSM is the best strategy for drawing out customer

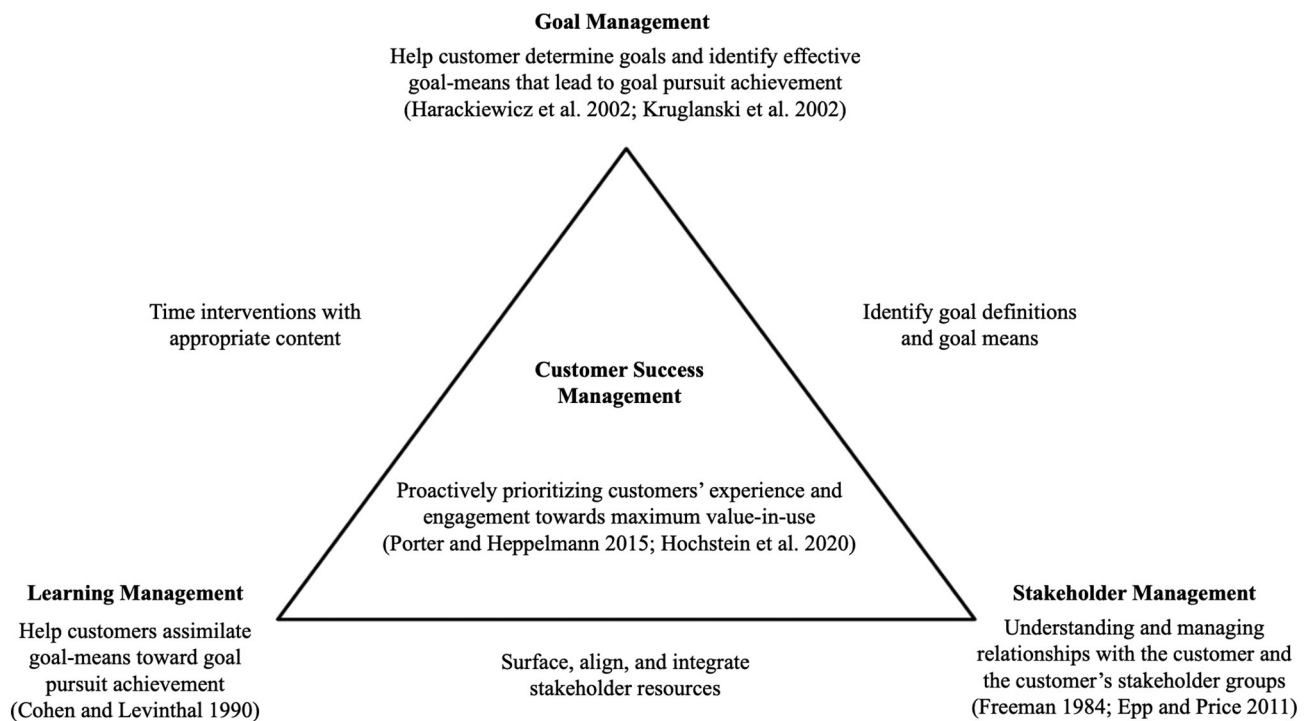


Fig. 2. Research streams relevant to customer success management.

resources toward value-in-use. For example, Airbnb not only refunded guests impacted by the Covid-19 pandemic, but also refunded a portion of hosts' lost booking revenue.

In sum, traditional customer management practices are tasked with considering an individual buyer's experience and relationship with the seller. CSM's commitment to proactively maximize customers' value-in-use suggests that CSM goes further by not only considering customers' individual experience and engagement but also considering customers' success from a network perspective. Stakeholder management tasks CSM with (1) surfacing diverse stakeholder goals, (2) selecting and implementing stakeholder conflict strategies that maximize the customers' value-in-use.

3.3. Learning management

While the word “success” in CSM denotes that success is the outcome of CSM, the word “success” also implies that CSM moves away from failure. However, failure is often the pathway to success. For example, academic scholars have cited examples where implementation failed or at least partially failed more than 50% of the time (Xin & Choudhary, 2019). CSM, then, may not only be concerned with success management but also customer failure management. One may surmise that managing failure requires CSM to reposition failure as an opportunity for learning, where learning reorients a customer back toward success. To investigate this further, we draw upon learning management as a foundational CSM research stream.

Learning management refers to teaching customers how to apply goal-means toward goal pursuit achievement. A key operation of learning management is to help customers increase absorptive capacity, which refers to a firm's ability “to recognize the value of new information, assimilate it, and apply it to commercial ends” (Cohen & Levinthal, 1990, p. 128; Steinhoff, Kanuri, Kim, & Palmatier, 2020). The premise of absorptive capacity is self-reinforcing – organizations with prior knowledge are more likely to exploit new knowledge. The concept of absorptive capacity tasks CSM to go further than assessing customers' satisfaction and loyalty, to assess customers' access to knowledge and draw out customer resources toward assimilation of

that knowledge in pursuit of goal achievement. Promoting customers' access and assimilation of knowledge could manifest in new CRM innovations whereby customers have increasingly greater access to (1) performance measurements and (2) insights for performance recovery or acceleration. For example, CSM based learning management may build upon CRM by utilizing AI and machine learning to deliver the right insights or corrective action at the right time.

Recent empirical work on customer product purchase and usage decisions indicates that there are predictable failure points when customer product usage is most likely to be abandoned. Consumer research reveals that customers overestimate the rate of acquiring product-usage-mastery prior to initial use. However, after initial use, customers then underestimate the rate of continued learning. While the initial overestimation motivates trial, the subsequent underestimation is often coupled with discouragement and abandonment. Surprisingly, notifying customers of their post-trial underestimation bias does not eliminate customers' thinking errors (Billeter, Kalra, & Loewenstein, 2010). In response, learning management tasks CSM to uncover new methods for intervention timing and content that maximize customers' value-in-use. On the one hand, a non-fiduciary-form of CSM could allow customers to fail in order to improve customers' chances of goal achievement. For example, Dong, Evans, and Zou (2008) discovered that when customers co-create a service recovery, customers report greater “role clarity, perceived value of future co-creation, satisfaction with the service recovery, and intention to co-create value in the future” (p. 123). On the other hand, a fiduciary-form of CSM could rely on leading indicators to proactively aid before failure occurs. For example, some trading brokerages will close out margin trading positions before they result in catastrophic financial loss.

CSM's commitment to proactively maximize customers' value-in-use suggests that CSM goes further than providing traditional customer service and support. In order to aid customers' goal achievement, CSM focuses on customers' absorptive capacity by surfacing new insights and connecting customers to new data points. CSM intervention strategies utilize appropriate content and timing to promote customer goal achievement even if it means letting customers fail. Altogether, learning management tasks CSM with (1) increasing absorptive capacity by

Table 3
Business examples of customer success management.

Conceptual Basis	Definition	Business Challenge	CSM Based Solution	Business Outcome
Philosophical	CSM forefronts the customer as the primary actor striving to achieve its own goals. Rather than adopting the traditional sales narrative with the seller as the primary actor offering something that the customer receives and experiences, CSM adopts a customer as actor narrative with the implicit belief that if customers are successful then the providers enabling the customers will also be successful.	ADP sales reps had difficulty getting referrals since clients struggled with product adoption and achieving ROI based outcomes.	ADP recognized that retention, account expansion, and referrals are lagging indicators. ADP shifts focus toward driving client success metrics including driving outcomes and adoption. Additionally, ADP's customer help design new Customer Success processes.	51% of clients have established success plans and 73% of revenue secured under contract.
Organizational	CSM often manifests as a new functional unit in a selling firm's organizational structure that unites marketing, sales, and support functions. Across all CSM structural approaches, the objective is interoperability of disperse resources toward the customer's goal achievement	Actualize Microsoft's new mission statement to: "Empower every person in every organization on the planet to do more."	Reorganized their enterprise operating units to include a distinct customer unit with over 2000 employees focused on helping customers realize value, grow consumption, and bring the voice of the customer back into Microsoft.	"Customer Success has become an obsession with Microsoft's sprawling cloud business...Because ultimately in a consumption-based business, customer success is all that matters." —Microsoft CFO Amy Hood (in Forbes)
Research Streams <i>Goal Management</i>	CSM based goal management is concerned with helping customers determine goals and identify effective goal-means that lead to goal pursuit achievement	Rapid 7 users reported high NPS and loyalty scores, but also felt they were not succeeding at their jobs.	Rapid 7 shifts to new customer goal based metrics where success is determined by how well the users feel they are successful in achieving outcomes and whether their bosses judge them to be successful.	Gaining a better understanding of the jobs customers are really trying to get done is transforming product management and development.
<i>Stakeholder Management</i>	CSM based stakeholder management is concerned with understanding and managing relationships with the customer and the customer's stakeholder groups including management teams and front-line employees, other suppliers and providers, and the customer firm's customers.	CampusLogic focused on a generalist CSM model. After introducing a third product line, customer stakeholders were not being understood and properly managed.	CampusLogic introduced CSM customer tiering to customer stakeholder could be segmented, understood, and managed.	Successfully grew CS team of 1 with 35 customers and 1 product to a CS team of 30 with 500 customers and 5 products
<i>Learning Management</i>	CSM based learning management is concerned with helping customers assimilate goal-means toward goal pursuit achievement	IBM 2015 CSM team is fully reactive focused on support tickets and is customer escalation based. Customer health scores are completely subjective.	Test conducted on one product line. CSM is retooled to generate proactive customer health scores and usage information to generate customer learnings.	33% better health score. 11 × adoption growth in 13 months.

sharing performance insights with customers and (2) selecting and implementing stakeholder intervention strategies.

In sum, CSM draws upon goal management, stakeholder management, and learning management in order to proactively maximize customers' value-in-use (see Fig. 2). First, CSM is responsible for customer goal management. Goal management entails understanding customer goals, influencing customer strategies to achieve success, and shaping customer goals with the seller's own offering such that the offering is pertinent to customers' current goal pursuits. Second, CSM is responsible for customer stakeholder management. Stakeholder management entails understanding the various entities that contribute resources to the customer firm. Resources must be interoperable or risk being underutilized. Additionally, stakeholders with competing objectives must be somewhat appeased or they will withhold resources. Third, CSM is responsible for learning management. Learning management entails onboarding users and helping them acquire the necessary knowledge and skills to fully utilize the seller's offering in their goal pursuit. Without learning to unlock the value of the seller's offering, customers will abandon the seller's offering regardless of its potential value.

4. Conclusion

As we conclude, we provide further evidence of CSM as an evolution in customer management by providing several business examples that illustrate how CSM enhances customer and firm performance (see Table 3). Consider two examples illustrated in the table. First, Microsoft recently updated their mission statement to read, “Empower every person in every organization on the planet to do more.” In order to deliver on this promise, Microsoft reorganized their enterprise operating units to include a distinct customer success business unit with over 2000 employees proactively focused on maximizing customers' value-in-use. Second, ADP sales people had difficulty getting referrals since clients struggled with product adoption and achieving value-in-use. Recognizing that retention, account expansion, and referrals are lagging indicators, ADP shifted their focus toward proactively driving customer success metrics such as outcomes and adoption. As a result, ADP secured 51% of their clients with established success plans and 73% of their revenue secured under contract.

Our motivation for this paper is to provoke academic researchers to consider whether CSM is an existing concept by a new name or a genuine step forward in customer management philosophy, theory, and practice. Throughout this paper we examined claims that CSM is a genuine response to shifts in the technological and business landscape similar to prior innovations in customer management. We examined the initial articulations of CSM in the literature in order to identify how CSM innovated upon or departed from CRM, Customer Experience, and Customer Engagement. Finally, we examined goal management, learning management, and stakeholder management research streams in order to generate original research questions and encourage managerial experimentation in CSM implementation.

Drawing upon goal management research streams, scholars could examine whether prioritizing satisfaction counterintuitively decelerates customers' goal achievement. Drawing upon stakeholder management research streams, scholars could examine how customer network alignment strategies draw out stakeholder resources in service of customers' lifetime value. Drawing upon learning management research streams, scholars could examine how firms consciously use failure as a strategy to accelerate customers' lifetime value. Altogether, future CSM research could examine firm level factors, competitor level factors, and customer level factors that predict a non-fiduciary-form of CSM versus a fiduciary-form of CSM.

In sum, this paper provides evidence that CSM not only builds upon traditional customer management practices, but also represents a departure from traditional customer management practices by proactively prioritizing customers' experience and engagement toward maximum

value-in-use (Hochstein et al., 2020; Porter & Heppelmann, 2015). Advocates of CSM can draw upon the evolution of customer management practices, initial articulations of CSM in the literature, and goal management, stakeholder management, and learning management research streams to generate original research questions. Skeptics of CSM can also draw from this paper as a basis for providing a rebuttal demonstrating evidence that CSM does not represent an evolution in customer management practice. Altogether we invite further exploration and consideration of CSM as the next evolution in customer management practice.

Acknowledgement

The author team thanks the SAMS Institute for supporting this research and providing industry connections to discuss the ideas in this manuscript.

References

- Aarikka-Stenroos, L., & Jaakkola, E. (2012). Value co-creation in knowledge intensive business services: A dyadic perspective on the joint problem solving process. *Industrial Marketing Management*, 41(1), 15–26.
- Alsop, F. (1993). Customer-focused communication: The key to total quality success. *ISA Transactions*, 32(1), 5–8.
- Arona, S. (2016, February 3). Beyond the health score: Driving improved customer success management with deeper, Real-time insight. Retrieved from <https://medium.com/transform-digital-experiences/beyond-the-health-score-driving-improved-customer-success-management-with-deeper-real-time-4e657d704b5d>.
- Billetter, D., Kalra, A., & Loewenstein, G. (2010). Underpredicting learning after initial experience with a product. *Journal of Consumer Research*, 37(5), 723–736.
- Bowden, J. L. H. (2009). The process of customer engagement: A conceptual framework. *Journal of Marketing Theory and Practice*, 17(1), 63–74.
- Chen, I. J., & Popovich, K. (2003). Understanding customer relationship management (CRM): People, process and technology. *Business Process Management Journal*, 9(5), 672–688.
- Cohen, W. M., & Levinthal, D. A. (1990). Absorptive capacity: A new perspective on learning and innovation. *Administrative Science Quarterly*, 35(1), 128–152.
- Cooper, R. G., & Kleinschmidt, E. J. (1987). Success factors in product innovation. *Industrial Marketing Management*, 16(3), 215–223.
- Donaldson, T., & Preston, L. E. (1995). The stakeholder theory of the corporation: Concepts, evidence, and implications. *Academy of Management Review*, 20(1), 65–91.
- Dong, B., Evans, K. R., & Zou, S. (2008). The effects of customer participation in co-created service recovery. *Journal of the Academy of Marketing Science*, 36(1), 123–137.
- Ekici, A. (2013). Temporal dynamics of trust in ongoing inter-organizational relationships. *Industrial Marketing Management*, 42(6), 932–949.
- Epp, A. M., & Price, L. L. (2011). Designing solutions around customer network identity goals. *Journal of Marketing*, 75(2), 36–54.
- Fawcett, S. E., & Cooper, M. B. (1998). Logistics performance measurement and customer success. *Industrial Marketing Management*, 27(4), 341–357.
- Fornell, C., Rust, R. T., & Dekimpe, M. G. (2010). The effect of customer satisfaction on consumer spending growth. *Journal of Marketing Research*, 47(1), 28–35.
- Freeman, R. E. (1984). *Strategic management: A stakeholder approach*. Boston: Pitman.
- Gainsight (Ed.). (2019). *New study powered by LinkedIn data reveals customer success growing 736% - among top 10 fastest growing professions: Customer success software*.
- Grewal, D., Roggeveen, A. L., Sisodia, R., & Nordfält, J. (2017). Enhancing customer engagement through consciousness. *Journal of Retailing*, 93(1), 55–64.
- Grönroos, C. (2011). A service perspective on business relationships: The value creation, interaction and marketing interface. *Industrial Marketing Management*, 40(2), 240–247.
- Harackiewicz, J. M., Barron, K. E., Pintrich, P. R., Elliot, A. J., & Thrash, T. M. (2002). Revision of achievement goal theory: Necessary and illuminating. *Journal of Educational Psychology*, 94(3), 638–645.
- Harmeling, C. M., Moffett, J. W., Arnold, M. J., & Carlson, B. D. (2017). Toward a theory of customer engagement marketing. *Journal of the Academy of Marketing Science*, 45(3), 312–335.
- Henderson, C. M., & Palmatier, R. W. (2011). Understanding the relational ecosystem in a connected world. *The connected customer* (pp. 55–94). New York: Routledge.
- Henderson, C. M., Steinhoff, L., & Palmatier, R. W. (2014). *Consequences of customer engagement: How customer engagement alters the effects of habit, dependence, and relationship-based intrinsic loyalty*. Marketing Science Institute Working Papers Series14–121.
- Hochstein, B., Rangarajan, D., Mehta, N., & Kocher, D. (2020). An industry/academic perspective on customer success management. *Journal of Service Research*, 23(1).
- Kim, J. J., Steinhoff, L., & Palmatier, R. W. (2020). The emerging theory of loyalty program dynamics. *Journal of the Academy of Marketing Science*.
- Kruglanski, A. W., Shah, J. Y., Fishbach, A., Friedman, R., Chun, W. Y., & Sleeth-Keppler, D. (2002). A theory of goal systems. In M. P. Zanna (Ed.), *Advances in experimental social psychology* (pp. 331–378). San Diego: Academic Press Vol. 34.
- Lam, S. Y., Shankar, V., Erramilli, M. K., & Murthy, B. (2004). Customer value, satisfaction, loyalty, and switching costs: An illustration from a business-to-business service

- context. *Journal of the Academy of Marketing Science*, 32(3), 293–311.
- Lapierre, J. (1997). What does value mean in business-to-business professional services? *International Journal of Service Industry Management*, 8(5), 377–397.
- Louro, M. J., Pieters, R., & Zeelenberg, M. (2007). Dynamics of multiple-goal pursuit. *Journal of Personality and Social Psychology*, 93(2), 174.
- Lynley, M. (2016, June 23). Twilio prices its IPO at \$15 per share, above its previous target [Blog post]. Retrieved from <https://techcrunch.com/2016/06/22/twilio-prices-its-ipo-at-15-per-share-above-its-previous-target/>.
- Mehta, N. (2019, June 10). Pulse is a community, not a conference [blog post]. Retrieved from <https://www.gainsight.com/blog/pulse-is-a-community-not-a-conference/>.
- Mehta, N., Steinman, D., & Murphy, L. (2016). *Customer success: How innovative companies are reducing churn and growing recurring revenue*. New Jersey: John Wiley & Sons.
- Mithas, S., Krishnan, M. S., & Fornell, C. (2005). Why do customer relationship management applications affect customer satisfaction? *Journal of Marketing*, 69(4), 201–209.
- Mittal, B., & Lassar, W. M. (1996). The role of personalization in service encounters. *Journal of Retailing*, 72(1), 95–109.
- Murphy, L. (2019, June 01). Customer success: The definitive guide 2019. Customer-centric growth by Lincoln Murphy. Retrieved from <https://sixteenventures.com/customer-success-definition>.
- Novak, T. P., Hoffman, D. L., & Yung, Y. F. (2000). Measuring the customer experience in online environments: A structural modeling approach. *Marketing Science*, 19(1), 22–42.
- Oliver, R. L. (1997). *Satisfaction: A behavioral perspective on the consumer*. New York: McGraw-Hill.
- Palmer, A. (2010). Customer experience management: A critical review of an emerging idea. *Journal of Services Marketing*, 24(3), 196–208.
- Pattabiraman, K. (2019, January 10). LinkedIn's most promising jobs of 2019 [blog post]. Retrieved from <https://blog.linkedin.com/2019/january/10/linkedin-most-promising-jobs-of-2019>.
- Payne, A., & Frow, P. (2005). A strategic framework for customer relationship management. *Journal of Marketing*, 69(4), 167–176.
- Porter, M. E., & Heppelmann, J. E. (2015). How smart, connected products are transforming companies. *Harvard Business Review*, 93(10), 96–114.
- Purcărea, T. (2018). Developing marketing capabilities by mapping customer journey and employer journey, considering the blurring of boundaries between marketing, technology and management. *Holistic Marketing Management Journal*, 8(1), 22–44.
- Reinartz, W., Krafft, M., & Hoyer, W. D. (2004). The customer relationship management process: Its measurement and impact on performance. *Journal of Marketing Research*, 41(3), 293–305.
- Reypens, C., Lievens, A., & Blazevic, V. (2016). Leveraging value in multi-stakeholder innovation networks: A process framework for value co-creation and capture. *Industrial Marketing Management*, 56, 40–50.
- Richards, K. A., & Jones, E. (2008). Customer relationship management: Finding value drivers. *Industrial Marketing Management*, 37(2), 120–130.
- Roy, S. K., Padmavathy, C., Balaji, M. S., & Sivakumar, V. J. (2012). Measuring effectiveness of customer relationship management in Indian retail banks. *International Journal of Bank Marketing*.
- Sigala, M. (2018). Implementing social customer relationship management: A process framework and implications in tourism and hospitality. *International Journal of Contemporary Hospitality Management*, 30(7), 2698–2726.
- Smith, J. B., & Colgate, M. (2007). Customer value creation: A practical framework. *Journal of Marketing Theory and Practice*, 15(1), 7–23.
- So, K. K. F., King, C., Sparks, B. A., & Wang, Y. (2016). Enhancing customer relationships with retail service brands: The role of customer engagement. *Journal of Service Management*, 27(2), 170–193.
- Steinhoff, L., Kanuri, V. K., Kim, J. J., & Palmatier, R. W. (2020). *Dynamic tensions of B2B service expansion for customer retention*. (Working Paper).
- Stone, M., Woodcock, N., & Wilson, M. (1996). Managing the change from marketing planning to customer relationship management. *Long Range Planning*, 29(5), 675–683.
- Thorelli, H. B. (1986). Networks: Between markets and hierarchies. *Strategic Management Journal*, 7(1), 37–51.
- Van Doorn, J., Lemon, K. N., Mittal, V., Nass, S., Pick, D., Pirner, P., & Verhoef, P. C. (2010). Customer engagement behavior: Theoretical foundations and research directions. *Journal of Service Research*, 13(3), 253–266.
- Verhoef, P. C. (2003). Understanding the effect of customer relationship management efforts on customer retention and customer share development. *Journal of Marketing*, 67(4), 30–45.
- Vivek, S. D., Beatty, S. E., Dalela, V., & Morgan, R. M. (2014). A generalized multi-dimensional scale for measuring customer engagement. *Journal of Marketing Theory and Practice*, 22(4), 401–420.
- Woodall, T. (2003). Conceptualising “value for the customer”: An attributional, structural and dispositional analysis. *Academy of Marketing Science Review*, 12, 1, 1–42.
- Xin, M., & Choudhary, V. (2019). IT investment under competition: The role of implementation failure. *Management Science*, 65(4), 1909–1925.
- Yeung, K. (2017, May 2). Twilio warns about Uber's waning usage of its platform. Retrieved from <https://venturebeat.com/2017/05/02/twilio-warns-about-ubers-waning-usage-of-its-platform/>.
- Zoltners, A. A., Sinha, P. K., & Lorimer, S. E. (2019, November 18). What Is a Customer Success Manager? Retrieved from <https://hbr.org/2019/11/what-is-a-customer-success-manager>.