The role of Customer Relationship Management on customer retention and customer satisfaction in educational consultancy: A case of EDUCATION STATE

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Abstract

Title of thesis: The role of Customer Relationship Management on customer retention and customer satisfaction in educational consultancy: A case of EDUCATION STATE

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CRM stands for a collection of functional strategies, processes, and technology that work together to deliver the best possible customer experience through efficient data management and customer interactions. The number of overseas students and educational institutions is quickly growing as a result of the globalisation of the education system and the shifting economic landscape. To examine the breadth and tactics of utilising CRM automation in educational consultation while using Education State as a case study, the goal of this research is to identify the relationship between CRM and customer satisfaction and retention. This study focuses on both the technological and functional elements of CRM while identifying present shortcomings and making suggestions for future development.

A structured interview method has been used in this research to collect the data using open-ended questions. 10 managers and executives have been recruited for the interview sessions. The interview transcripts have been analysed through a coding-based thematic analysis process. The MAXQDA-based thematic analysis results have been presented and discussed in previous chapters. The purpose of this chapter is to conclude the study as per the findings and implications.

It has been found that sales and customer care are the major components of CRM activities along with analysis, prediction and forecasting. It has been found that Digital CRM adaptation can be very beneficial for any educational consultancy organisation because it automates complex and dynamic CRM procedures while ensuring a centralized and transparent information-sharing platform. The development of digital infrastructure with proper internet systems, devices, and connectivity with proper change management is essential for a digitalized CRM system.

Declaration of Authorship

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Table of Contents

List of Tables

List of Figures

List of Appendices

List of Abbreviations

AI: Artificial Intelligence

CRM: Customer Relationship Management

EC: Educational Consultant

Chapter 1: Introduction

1.1 Background

To manage and analyse customer interactions and data across the customer lifecycle, businesses employ a combination of practices, strategies, and technologies known as customer relationship management (CRM) (Ngelyaratan and Soediantono, 2022). The objective is to strengthen interactions with customers in order to promote customer retention and increase sales. CRM systems gather information about customers from various points of contact between them and the business, such as the company's website, the company's phone line, live chat, direct mail, marketing materials, and social media (Nicuta, Luca and Apetrei 2018). CRM systems can also give staff workers who deal with customers in-depth knowledge of their personal data, purchasing history, shopping preferences, and issues. An Educational Consultant (EC) is a consultant who helps the students with their educational planning and selection of educational organisation. An EC offers similar services to the students to guide them to select the best school, college and university that will suit their career objectives of the student (Tamang and Shrestha, 2021). Educational Consultants help in a smooth transition of the entire process which includes counselling, profiling, documentation, and visa process. A foreign university, college, or language school abroad has a partnership with an overseas education consultant that pays a portion of the tuition for each student enrolled on the institution the consultancy. Education State is an education consultancy company. The company is based in Dublin-and the company is currently functioning as an international education consultancy agency.

Education State (2022) provides courses, universities and other education-related information, guidance, help, and counselling to International students who want to study in the Republic of Ireland. Within the major educational institutions all around Turkey, Education State has been successful in building strong relationships with international students. The company is well-equipped to handle the needs and expectations of overseas students because they have advanced knowledge and experience in the field of the Irish higher education system. Education State has a large number of competitors. However, the major competitive advantage of the company over its rivals is that the founders have experience working and studying at Irish universities and other private and public educational institutions. It provides them with additional knowledge and source of information.

The business aim of the company Education State is to offer reliable educational guidance for abroad possibilities as well as academic and personal support services. The company provides support in the initial phase of the abroad learning journey of the students (Education State, 2022). Education State always collects adequate information to make them aware of the unique requirements of each student and their parents or sponsors and wants to make this process simple for all applicants. The services that Education State provide include free education consultancy, university placement service, free advice and guidance on work placements, visa assistance, accommodation services, airport pickup, and social and cultural activities.

1.2 Problem Statement and Rationale

In the past 10 years, the market of the educational industry is becoming more globalized and the number of competitors is also increasing (Waller *et al.,* 2019). The industry of educational constancy is also increasing along with the increasing number of migratory international students. Based on the scope of service provided, different consultation agencies provide a different range of services, however the rapid change in the different fields of education. The demand for abroad education is also raising in Turkey (Sagsan, Subasi and Gurhan, 2018). The number of competitors in Turkey is also increasing who are providing consultancy services to the students. At the same time, the demand for the Irish education system is also increasing among the students who are seeking education abroad.

It has been found that lack of predictability about the market and lack of beneficial decision-making are causing major competitive challenges in the Education Consultation industry, especially for new companies. The lack of available structure regarding the CRM system in the educational consultancy industry and its impact on client satisfaction are also restricting the process of finding effective promotional and marketing strategies. A large number of educational consultancy company does not have any proper CRM governing structure that can ensure customer satisfaction and retention that can ensure the growth of the industry (Rashmi, Pallavi and Adarsha, 2021). In this situation, it is essential to evaluate the importance of CRM in the educational consultancy industry for ensuring customer satisfaction and retention. The strategies and methods of integrating digitalized CRM systems are essential to developing an appropriate adaptation plan that can successfully increase customer acquisition and loyalty in the educational consultancy industry.

Lack of predictability and lack of decision-making-related support is causing major issues in the Education Consultation industry. It will also result in a lack of ability to support effective

promotional and marketing strategies. This research can highlight the essentiality of CRM and strategies for integrating digitalized CRM to increase customer acquisition and loyalty in the educational consultancy industry.

1.3 Research Questions

Based on the problems identified above it can be said that there are some questions in the context of CRM and its impact on the satisfaction of customers educational consultancy industry. In the following section, the identified research questions have been presented.

- What are the major components of CRM that influence customer satisfaction and retention?
- How do the components of CRM have an impact on customer satisfaction and retention?
- Why CRM automation can help an educational consultancy named Education State to ensure customer satisfaction and retention?
- How CRM automation can be adapted in an educational consultancy named Education State?

1.4 Aim and Objectives

This research aims to find the relationship between CRM and customer satisfaction and retention, in order to evaluate the scope and strategies of utilising CRM automation in educational consultancy while using Education State as a case study.

The objectives of this research paper are:

• To explore the major components of CRM that influence customer satisfaction and retention

• To examine the impact of the components of CRM on customer satisfaction and retention

• To evaluate the benefit of using CRM automation for educational consultancy named Education State to ensure customer satisfaction and retention

• To determine the strategy and scope of adopting CRM automation in an educational consultancy named Education State

1.5 Scope of the Study

This study is focused on examining the CRM methods and technologies used in the educational consultancy industry. However, the scope of this paper is limited to a particular educational

consultant company named Education State. The study analyses the functionalities, effectiveness and limitation of CRM in Education State. The scope of this study is limited to the reflective information from the people of the Education State. This study does not have access to observational data and organisational documentation. Therefore, this study focused on the experience and opinions shared by the people of the chosen organisation. Considering the fact that the source of information is highly reflective and subjective as well a qualitative interpretation process has been used in this study.

1.6 Structure of the Study

The structure of this paper is based on five major sections or chapters. The first chapter is the Introduction, where the topic is introduced along with the rationale, aims and objectives of the study. After that in chapter 2, the literature review has been conducted considering the existing reports, journals, research papers, books and other authentic secondary sources. The third chapter of this paper is a methodology where the conceptual and practical aspects of the used methods and tools to conduct the research have been analysed. The fourth chapter is the findings and analysis in which the results after analysing the collected data have been presented along with the description of the findings and evaluations. The fifth chapter has been developed to discuss the findings as per the research questions of the paper while highlighting the limitations of this study. In chapter six, the conclusion of this study has been presented along with the future scope of conducting research.

Chapter 2: Literature Review

The purpose of this literature review section is to develop an effective understanding of the current research that is relevant to the research question. Conducting a literature review enables the researchers to find out the degree to which the research area has been explored till now and identify the gaps that require focus (Antons *et al*. 2021). The articles have been selected based on specific selection criteria. The first criterion is that the source is published on an authentic and credible platform. The second selection criterion is that the paper has been published within the past 10 years. The third selection criterion is that the paper has been published in the English language. After reviewing the sources, the themes have been developed based on the major findings of the sources and the objectives of the study. Each theme has been discussed by the findings from secondary sources.

In the following sections, a review of literature relevant to the research topic, that is, the relationship between CRM and customer satisfaction and retention, in order to evaluate the scope and strategies of utilizing CRM automation in educational consultancy, has been done. The key points that have been discussed in the following section are The Concepts of CRM and Components of CRM, the Impact of CRM on customer satisfaction and retention, CRM and Its Different Aspects of Marketing, CRM application and Automation, and Customer relation in Educational Consultancy. The Concepts of CRM and Components of CRM the fundamental concepts of CRM and its component have been discussed followed by the discussion about the relationship with the consumer relation factors. Under automation, the advanced technologies and their use in CRM have been discussed.

2.1 The Concepts of CRM and Components of CRM

CRM is an organized and systematic approach that analyse customer interactions and data across the customer lifecycle in order to ensure beneficial customer handling to ensure customer satisfaction through using a combination of business practices, strategies, and technologies (Ngelyaratan and Soediantono, 2022). The major benefit of CRM is that it strengthens interactions with customers in order to promote client retention and increase sales. It helps the organisation to collect and analyse customer-related information and to project forecasting for profitable decision-making.

According to Alokla *et al.* (2019), the key components of CRM include Customer Service, Sales Operations, Reporting, Marketing and Communications. The most crucial aspects of CRM are Sales. The majority of corporate organisations use CRM for forecasting, tracking

sales transactions, and keeping tabs on possible encounters with customers. It is important because it facilitates a better understanding of income creation prospects. Analysing sales estimates and employee performance is another aspect of this component. As highlighted by Ngelyaratan and Soediantono (2022), various factors collaborate to make automation a logical unit in order to accomplish an overall increase in the development as well as expansion of the industry. Lead management, customer support, forecasting, opportunity management, analysis of pipeline, messaging systems, task management, campaign management, as well as reporting are among the key components of the same. In the following section in *Figure 2.1* the structure and major activities under the CRM have been discussed using a graphical presentation form, which shows Customer service, Marketing, Sales, and Report as the parts of CRM.

*Figure 2.1 Theory of CRM (*Lam *et al, 2021)*

Kampani and Jhamb (2020) have highlighted the importance of lead management as one of the major components of CRM. As the name implies, lead management entails tracking sales leads along with their distribution. Sales businesses, marketing companies, and client executive centres stand to gain the most from this CRM component. It requires effective management of the customer base, creating unique forms, finishing mailing lists, and many other things. In order to increase sales, it is important to thoroughly examine both possible sales leads and the buying habits of current customers.

Rahimi *et al.* (2017) however have argued that customer service is a major component of CRM. CRM places a strong emphasis on gathering data on customers, including their purchase histories and habits, and entails distributing that data to the relevant and essential organizations. Because of this, CRM must include customer service. Nearly all of the primary departments, including the sales department, marketing team, and management staff, are obliged to take action to increase their knowledge of and comprehension of the wants and concerns of the

customers. This unquestionably enables the business or corporation to provide clients with rapid, accurate help and answers as well as meet their wants, which raises the reliability as well as the confidence of the public in the firm.

Malthouse *et al.* (2013) have highlighted, from the perspective of an organization, satisfaction, loyalty and profitability are the 3 key components associated with CRM. Customer satisfaction is a gauge of how satisfied a customer is with an organization, product as well as service. Customer satisfaction is crucial since it serves as a buying guide for both the business and the client. Customers are more inclined to shop at another firm if they are dissatisfied with the outcome of their transaction. Referrals along with repeat business are indicators of customer loyalty. As argued by Ngelyaratan and Soediantono (2022), referral as a component has been found to be based on the frequency of the purchases made by the customer from a certain business compared to its competitors that could be more suitable for their requirements or comparable to it. The likelihood that a loyal customer would be happy with their purchase as well as suggest the product to others increases. It is crucial since it gives the business a reliable source of income. As mentioned by Kampani and Jhamb (2020), the level of profit of business experience while operating is a measurement of its competitiveness. Entire revenue fewer total expenditures can be used to compute it. Profit is significant because it enables businesses to carry on with their operations and maintain a profit for developing and flourishing. Without a profit, businesses would ultimately run out of money and would be unable to pay their suppliers, workers, or taxes.

2.2 Impact of CRM on customer satisfaction and retention

According to Valmohammadi (2017), CRM is significantly boosting market share, boosting productivity, and improving staff morale, all while improving in-depth customer experience along with Customer Satisfaction, which will lead to improved customer loyalty. Companies having effective CRM possess clear information about who their clients are, what they need, and factors that will make them happier.

According to Payne and Frow (2013), CRM highly influences the quality of experience of the customers to a great extent. The authors have highlighted that providing clients with high-quality encounters is a crucial component of customer happiness. The difficulty is in realising that every customer has different wants. Regarding goods and services provided by the organization, every client is supposed to have an opinion. As argued by Mullakara and Asokan (2020), it is crucial for the management to comprehend the customer personas and provide for

their needs. CRM aids in improved customer comprehension by recording all identity and behavioural data. Then, the management may utilise this information to enhance your service and merchandise.

According to Schultz, Malthouse and Pick (2012), CRM allows an omnichannel communication experience for the customers which is a major reason behind customer satisfaction and effective customer retention. Given the fact that in Ireland, a significant number of customers, omnichannel communication helps the customers to effectively avail service from a specific organization. Cui, Wong and Xiang (2012) have agreed with the fact highlighting that while millennial customers who have enhanced technological knowledge prefer to use websites via chat or emails, elderly customers prefer to communicate through phone calls. Additionally, since the pandemic had limited the scope of the customers to physically visit stores or offices, the presence of omnichannel communication has been found to have imposed a positive impact on customer satisfaction. Haudi *et al.* (2022) have highlighted that approximately 33 per cent of the customers have reported that they get frustrated when they have to repeat the process of contacting customer executives and the process of communication is not prompt and proactive. Given the fact that CRM binds multiple communication channels together for ensuring seamless communication expertise, it can be said that CRM is responsible for customer satisfaction as well as customer retention.

Tien, Nhi and Chi (2019) have highlighted the importance of personalisation for retaining customers. CRM enables the company to provide the customers with a personalized experience. The authors have highlighted that personalised communication with the customers makes the customers feel valued and act as a major retention technique. The CRM enables the company to provide personalised discounts or promotions to valued customers through direct messaging or through emails. Mullakara and Asokan (2020) have highlighted that personalisation through CRM is a two-way beneficial message. It not only enhances the satisfaction rate of the customers but also enhances the understanding of the company about the customers' preferences which in turn helps in customer segmentation. On the basis of their post-purchase experience, customers normally make additional purchases. Brands that provide their customers with thorough after-sales service are much more likely to get their business. Any enterprise should ideally stay in touch with the customers to have a proper update about demand, service quality, functional efficiency and others. If the client is experiencing any issues, they should inquire about the issues to find solutions.

According to Rodriguez and Trainor (2016), each customer has a buying/consumption habit from which one may identify the point of contact most conducive to fostering long-term loyalty. CRM compiles information on the media consumption as well as the purchase history of the customers to predict the kinds of offers that will attract each person and, in turn, will add relevancy that will maintain a high brand awareness value. As per Mullakara and Asokan (2020), the key focus here is finding ways to turn client curiosity into a real purchase, which may be accomplished by offering discounts, promotions, and incentives to enhance the experience. Making clever, target-centric offers that increase value aids in creating proactive client relationships where repeat purchases are feasible.

2.3 CRM and Its Different Aspects of Marketing

According to Agnihotri (2021), CRM marketing can be defined as a term that refers to strategies as well as techniques along with technologies, used by the management of an organization to ensure an effective relationship with the customers and thereby enhances customer retention and customer attraction. CRM uses effective and economical marketing for leveraging and expanding a firm's client base. CRM has really expanded the scope of marketing by vastly enhancing its functionality and effectiveness. Direct marketing, online marketing, email campaigns, and other smart CRM-related marketing tactics have been more developed in recent years (Tien *et al.* 2021a). As they assist in offering higher-up effectiveness as well as walloping company, these marketing techniques are more prospective than the typical methods of marketing. Additionally, they improve the rate of response in marketing efforts, reduce promotion costs as a result of low asset prices, and increase monitoring of the expenditure of the organizations. As presented by Otto, Szymanski and Varadarajan (2020), when the operation has to repeat the process of reaching customer executives as well as the communication is not timely and proactive, around 33 per cent of customers say they become frustrated.

A wide range of techniques is used for CRM-oriented marketing. Agrawal and Mittal (2019) have highlighted the efficiency and benefits of CRM-oriented web marketing, the author has highlighted that not only is this marketing technique inexpensive compared to other marketing techniques, but it also possesses the potential to reach out to a wide range of customers within a highly limited period of time. As argued by Kampani and Jhamb (2020), not only CRM-oriented web marketing campaigns can be tracked, calculated, traced and tested easily which in turn helps the marketers to understand the client base.

According to Siriwardana and Dissanayake (2018), major CRM-oriented techniques used in a range of industries include email marketing techniques and analysis of the buying behaviours of the customers online. Contrary to mail as well as phone-based marketing techniques, email marketing has shown to be more effective and less expensive. Email marketing can be defined as a type of information-driven direct marketing that encourages more precise customer response as well as efficient satisfaction of client demands. As presented by Kantorová and Bachmann (2018), additional appealing features include bulletins, the ability to send eCoupons and eCards, the ability to save activities to calendars, and more. A CRM system serves as a platform for examining online customer purchasing trends. This interactive technique offers high speed and excellent precision, and it incorporates profiling solutions that give detailed information about clients' buying patterns or behaviour. As argued by Hendriyani and Auliana, (2018), an individualised study of this behaviour reveals which brand or product the customers are most loyal to. By carefully gauging client wants and producing customer happiness, this succeeds in establishing long-term relations with clients. Assessing this specific purchasing pattern of customers online also aids in the improvement or modification of advertising strategies or approaches to shape the system in accordance with prospective outcomes.

2.4 CRM application and Automation

The CRM application refers to a technology for managing the interaction as well as relationships with the customers and potential customers. The key goal of the CRM application is to enhance the business relationship by staying connected with the customers, streamlining the processes and thereby improving the profitability of the business. Singh and Saini (2016), have highlighted that CRM allows businesses to focus on their relationships with customers, colleagues, suppliers and others. With an efficient and professional CRM in place, it becomes easier for the organizations to find new customers, win their trust, and provide effective support along with providing additional services throughout the support. In order to effectively manage and analyse customer interactions and data across the customer journey, businesses employ a mix of practices, strategies, as well as a technology known as Customer Relationship Management (CRM). As argued by Dewnarain, Ramkissoon and Mavondo (2021), the objective is to strengthen interactions with customers in order to promote client retention along with increasing sales. CRM systems gather information on customers from various points of contact between them and the business, such as the firm's site, the industry's phone line, live chat, direct email, promotional materials, and social media. CRM systems may also provide

staff workers who deal with customers, with in-depth knowledge of their personal data, purchasing history, buying habits, as well as issues.

As added by Hendriyani and Auliana (2018), one of the key features of CRM is to ensure efficient automation of the issues and thereby save time. CRM automation poses the potential to streamline the whole marketing to the sales process with the help of a series of workflows. The key factors include marketing automation tools like helping with the handling of email marketing campaigns along with using templates as well as data synching software. Tien *et al.* (2021b) have highlighted the usage of sales automation tools for CRM for call scheduling, automation of the workflow as well as task assignment within a department. In addition to this, software robots that include AI or Artificial Intelligence chatbots for customer service automation are used for CRM Automation.

According to Hendriyani and Auliana (2018), it is advantageous to be able to simplify processes. Duplicate, boring chores may be reduced to a single click by investing a highly limited amount of time in creating processes and triggers. This then helps retailers, sales representatives, as well as customer service agents to focus on tasks that are more essential than documentation, such as lead development, helps in the identification, as well as phone calls directed at leads. According to Rahimi and Gunlu (2016), automation enables teams to utilise CRM data in a more efficient way. The process of sales may be sped up by using it to manage customer research, quote production, and sometimes even legal paperwork. Lead grading is improved since potential clients have access to all of their data. Matching high-performing sales representatives with high-value prospects is therefore simpler.

According to Agrawal and Mittal (2019) more personalised sales encounters result from more accurate data. For greater client retention, the management of an organization may pair excellent accounting services with prize acquisitions similarly to how one can link sales to leads. The incorporation of chatbots into the client service workflow is one feature of several CRM automation platforms. These helpful automation bots may assist in swiftly identifying customer questions and concerns and resolving them with appropriate action if that involves initiating a phone conversation request from a CSR or responding to a query.

2.5 Business model in educational consultancy

As mentioned by Kamble and Bobade (2020), an educational consultancy can be defined as an organization that assesses the student's academic qualification, skills, scopes of learning and potentiality to provide guidance and planning for higher education including schools, colleges,

and universities. As highlighted by this paper, educational consultants and counsellors act as an agent for learning experiences abroad. These agents select the right destination for the student with a proper choice of universities while ensuring lucrative prospects in the academic career. Mumu (2020) have highlighted that the key role of an educational consultant includes helping students to develop proper documentation, visa, educational certificate and others to embark on the journey of the international education system. An educational consultant is stipulated to have effective knowledge about the specific documentation needs of each educational organisation of different countries so that the consultant can guide the student with a proper method of documentation procedures, scholarship criteria, and application procedures. The services that are provided include choice or selection of universities and language schools, supporting visa documentation and migration process, drafting and compiling college/language school application materials, and guiding the student in the entire journey of the academic courses as per the consultancy contract. The service provided by educational institutions enables an easier and more systematic educational system that connects students with the educational organisations of different countries.

According to Agrawal and Mittal (2019), the major operators of education consultation companies include counsellors, advisors and admission consultants. The key job role of counselling and providing advice on which organisation best suits the individual as well as the potential career growth of an individual in different educational organisations. The key stakeholders of an educational consultancy include administrators, program director/officer and language school, parents, students, universities and other educational organisations, and migration regulatory departments of respective countries. According to Bhattacharjee (2019), the development of the educational consultancy and its pupils is greatly influenced by consultants who keep an eye on how the curriculum is being taught in different organisations abroad while considering the fee structure and potential career growth of the student. Additionally, they take real-time updates about the new educational organisations that are carrying out new scholarship programmes while maintaining strong communications with the program director/officer and the administrators of language schools. They frequently get information regarding the effectiveness of their programme from instructors, students, as well as the local community. They can also use an expert's services to assess how well the programme is working. As argued by Ginsberg and Singh (2018), when it comes to parents, it has been found that parents pose the potential to influence the selection of the organisation where the students are under parental supervision while selecting a curriculum that can help to

play a major role for understanding their the student's skills, knowledge and talents. Parents are also responsible for providing crucial information to the educational consultants so that they can help the student makes effective decisions.

Like other business consultancies, educational consultancy follows a range of business models (Agrawal and Mittal, 2019). Amongst these, the three highly used business models include the Firm Model, Solo or Independent model and Productized model. The firm business model is used in large educational consultancies. This model supports the employer or employers to employ a wide range of associates, consultants, and junior and senior staff. A continuous training process is focused on in order to enhance the quality of services. Bhattacharjee (2019) has highlighted that some of the major advantages of a Firm model include a higher level of income and higher value assets that are even easier to sell. However, Mumu (2020) have argued that this model is not for start-up educational consultancies since it requires a huge investment in human resource and the profit margin is initially low. The majority of the start-up educational consultancies opt for the independent model where the number of employees is limited. This business model enables the organization to customize its service on the basis of the client's needs. This type of model focuses on working with fewer yet high-dollar value clients. While this type of business model poses a wide range of advantages, one of the major demerits of this model is even attrition of a single client can lead to a major loss in the business.

2.6 Customer relation in Educational Consultancy

CRM possess the potential to assist education professionals in building relationships with prospective students as well as enrolees, generating information-driven analysis to show progress toward achieving the set goals along with streamlining their recruitment and marketing strategies for saving time as well as effort. Meyers and VanGronigen (2018), have emphasised that lead creation is a component of CRM in the educational consulting sector. The digital applications that are commonly used as a digital CRM system include Zoho and Hubspot. These applications use a variety of sources, including websites, social media, Welkins, recommendations, and telephone calls, to generate inquiries, predictive suggestions and forecasting for customer handling. All leads may be collected, and the applications such as Zoho CRM or HubSpot CRM can trace the source of each lead to ensure customer satisfaction. This will make it easier for businesses to keep track of how each lead source is doing. All leads may be collected, and Zoho and HubSpot CRM can trace the source of each lead. This will make it easier for businesses to keep track of how each lead source is doing. Tien *et al*. (2021a), have stated that tracking each step of the process is found to be highly

crucial for better operation and better reporting. CRM in educational consultancy can be designed on the basis of the requirements of every business for managing the process. In addition to this, educational consultancies use CRM for collecting data as well as managing crucial documents.

Lam *et al.* (2021), have highlighted that CRM is used by educational consultancy agencies for a wide range of CRM analytics, lead management, document management, application management and strong follow-up. CRM is used for nurturing students for admission by focusing on the perspective of these students, and engaging with humans at various touch points both effectively and in a rapid manner.

2.7 Summary

From the above literature review, it can be concluded that the key components of CRM include sales, leading and reporting, marketing and customer service. It has been also found that businesses may concentrate on their connections with clients, employees, suppliers, and others thanks to CRM. CRM places a strong emphasis on gathering data on customers, including their purchase histories and habits, and entails distributing that data to the relevant and essential organizations. It is simpler for businesses to identify new customers, gain their confidence, deliver great support, and offer extra services along the support when they have an effective and professional CRM in place. Automation, Human Resource Management, Lead Management, Marketing, and Customer Service are some of the major CRM components. Sales forecast automation is one of CRM's most important components.

Educational Consultancy includes the experts or counsellors that specialise in overseas education support, direct, and advise students as they plan their higher education and language study abroad (Kamble and Bobade 2020). Education agents are perceived as commercial agents who work with profit-driven partners in various nations. The cost, accommodations, and the visa and documentation processes are the ones that take the longest because every country has different visa requirements and every college or institution abroad has different sets of documentation requirements. Students are confused when choosing the best education destination and the best course. Overall, it takes around a year to finish the process from beginning to conclusion.

CRM must incorporate customer service as a result. It has been found from the literature review that CRM highly influences the quality of experience of the customers to a great extent. From the literature review, it can be highlighted that providing clients with high-quality encounters

is a crucial component of customer happiness. The management team, sales department, and marketing team are just a few of the major departments that are required to take steps to better understand and comprehend the needs and concerns of the customers. Given that the CRM connects many communication channels to provide smooth communication, it can be claimed that CRM is in charge of both customer retention and satisfaction. Teams are able to use CRM data more effectively because of the utilization of automation. Utilizing technology to handle customer research, quotation generation, and perhaps even legal documentation may speed up the sales process. Since prospective customers have access to all of their data, lead grading has improved. Therefore, it is easier to pair high-performing sales reps with valuable prospects.

2.8 Research gap

After conducting the literature review several essential issues regarding the theoretical aspects of CRM and the practical implementation of CRM can be found that are associated with customer retention and loyalty. However, there are some major limitations of the existing literature in terms of the implications of the literature in the field of educational consultancy. It has been found that while a significant amount of information is available from scholarly articles about business consultancy, a highly limited amount of information is available about educational consultancy and how CRM is used in this industry. Most of the information focused on retail business and business service-providing companies. In the case studies, the discussion about educational consultancy services is very limited or ignorable. In order to close this gap, this research has been conducted specifically in the education consultancy industry.

2.9 Conceptual Framework

According to Shi and Wang, (2019), management decision is a major factor behind the effectiveness of marketing strategy, where the management of an organisation requires to evaluate the current situation and possible scopes to formulating marketing strategies. The management of marketing effectiveness includes planning of strategy, formulating a practical approach and executing the marketing plan with high cost-effectiveness. The marketing strategy is a major way to develop strong communication with the existing customer and potential customers. The marketing activities of a business include promoting and selling products and servicing through market research as well as advertising (France and Ghose, 2019). The effective marketing content and platform selection ensure how effectively the customers within the market are communicated about the deliverables of the business, pricing and facilities. In this digital era, online platform-based marketing such as online campaign, and

digital promotional pages allow two-way communication with the customer that result in Customer Relationship Management (CRM).

As per Kumar, Mokha and Pattnaik (2021), CRM plays an important role in customer satisfaction by influencing the perceived level of product and service quality by the customers. Consistent communication, feedback receiving, addressing customer complaints, and providing support and guidance to the customers are the key CRM activities that are executed by most successful enterprises. Customer satisfaction is the major modulator of customer retention. According to Makgopa (2018), the satisfaction rate of the customer is highly correlated ($p < 0.05$) with customer loyalty. The higher customer loyalty ensures that the customer will prefer the company more than its competitor while purchasing a product or service. The increased customer satisfaction increases customer retention.

In the following section, the conceptual framework has been presented (Figure 2.9) that has been developed from the theoretical discussion of different CRM concepts and the already existing literature.
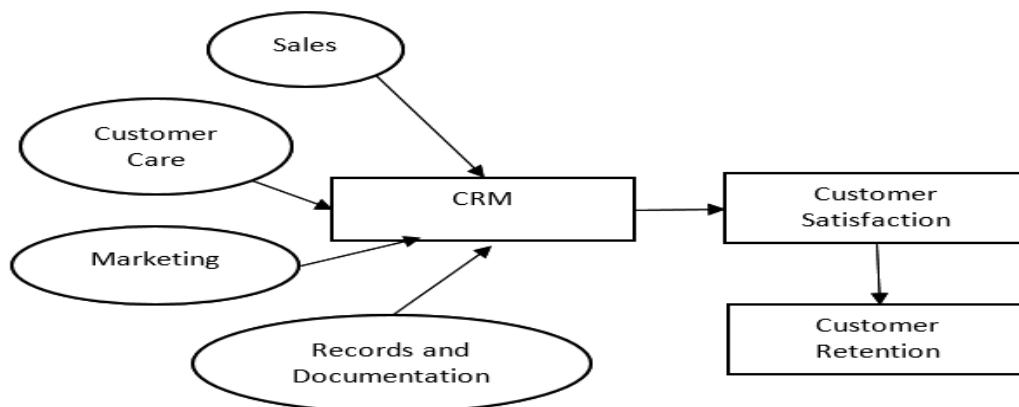

Figure 2.9 Conceptual framework

It has been found that Sales, Customer Care, Marketing, Records and Documentation analysis influence CRM and its effectiveness. Effective CRM influence customer satisfaction that can lead to higher customer retention level.

Chapter 3: Research Methodology

The purpose of this chapter is to present the different aspects of the methodology used for this paper considering both the theoretical and practical aspects. Both conceptual and practical aspects of the research methods have been discussed in the following section. The framework of research onion has been used to discuss the methodology of this research. The research onion has an out-to-inwards structure where the outer layers should be determined before proceeding to the internal layers. The outer layers are the conceptual aspects of the research and the inner layers are the practical aspects of research (Figure 3).
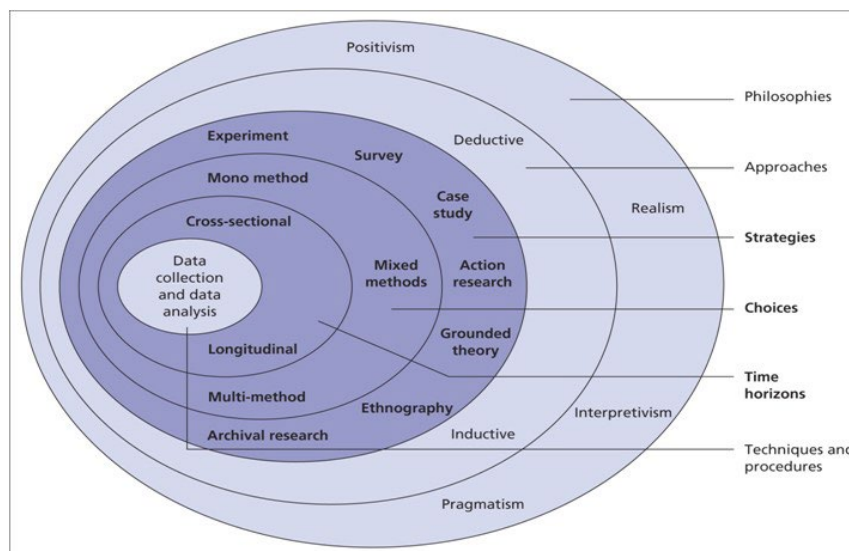

*Figure 3. Research onion (*Saunders, Lewis and Thornhill, 2015)

The outer layer of the research onion such as research philosophy, research approach and research design have been discussed and justified followed by the inner layer of the research onion that includes practical aspects of the research method such as sampling, data collection process and data analysis process. The ethical consideration of the research has been also mentioned in this section.

3.1 Research Philosophy and Research Approach

The research philosophy implies the aspect of perceiving the problem and the truth behind the existing problem. Research philosophy can be positivism, realism, interpretivism and pragmatism. The selection of the research philosophy depends on the ontological and epistemological aspects of the research (Žukauskas, Vveinhardt and Andriukaitienė 2018). As per the ontological aspect, it can be said that understanding the different aspects of customer satisfaction and retention while considering the influence of CRM can be relative based on the observational frame. The ontology of this paper is subjective. The relationship within the

subjective variables of this research is not measurable and therefore, the interpretivist epistemological aspect has been utilised in this paper. The chosen philosophy of this paper is the Interpretivism research philosophy. The interpretivism philosophy enabled this research to analyse Customer Relationship Management and Customer Satisfaction and Retention and their relationship with in-depth qualitative analysis.

The research approach can be inductive, deductive and abductive (Azungah, 2018). This paper is based on an inductive research approach. The selection of an inductive research approach can be justified by the way of answering the research questions of this paper. The purpose of this research is not to testify to any hypothesis or presumed theory. This paper is aimed at developing an understanding of the relation between different factors to find out the effectiveness and strategies of implementing automation. For this induction of the solution to the existing CRM-related issues and the effectiveness of CRM for a particular organisation, an inductive research approach has been used. The inductive approach enabled this research to explore the existing concepts of CRM and its impact on customer retention and loyalty descriptively and qualitatively while considering the in-depth analysis of different aspects of the customer relationship management system.

3.2 Research Design and Strategy

This paper is based on case study-based data collection and analysis, where Education State has been selected as the case to study. The qualitative research design has been used. The paper is based on a primary study-based research design while involving a group of human participants. The interview-based design enables this paper to collect the data regarding all variables of the research while involving each participant once in the data collection process. The case study design enabled this research to collect the data within shorter periods and lower investments. The case study-based primary data collection-based design also enabled both exploratory and explanatory approaches to developing the research design. The primary-data collection has been used in this research as a part of the research design while involving human participants. The qualitative strategy of this research allows this paper to explore and examine the relationship between different factors in a subjective way with in-depth interpretation.

3.2.1 Population and Sampling

The population of research should be selected in a way that can ensure that the collected information is the most valid information for answering the research questions. This paper is

focused on the educational consultancy named Education State. Therefore, the chosen population of this study is the managers and executives of the Education State organisation.

Non-probability sampling method has been used for this research. Purposive sampling has been used to select the participants. The purposive sampling method is a non-probability sampling method where the participants are selected when they satisfy a specific set of criteria (Campbell *et al*., 2020). Using purposive sampling the managers and executives of the Education Sate organisation have been selected while using a set of selection criteria through purposive sampling. A total of 10 participants have been selected (Table 3.2.1). The criteria of selection were: 1) they must be in a managerial or executive position, 2) they must have 7 years of experience in the educational consultancy industry, 3) they must have at least 5 years of experience in the company education state, 4) they must have working experience in sales or customer support, or marketing or promotion or reporting and service design functionalities.

Table 3.2.1 Details of Sampling Criteria

Parameter	Information
Total Participants	10
Participants Details	5 Managers 5 Executives
Industrial Experience	At least 7 years
Experience in Education State	At least 5 years
Functionalities	CRM-related, Sales, Customer Support, Marketing, Promotion, Data Reporting and Service Designing
Technical Knowledge	Digital CRM Application

3.2.2 Data Collection Method

The structured interview method has been used in this research to collect the data. The interview has been done through a digital platform-based video call. The questionnaire is presented to the interviewees one by one through verbal communication. Initially, the potential respondents were approached by the researcher with the participation request. Before, conducting the interview the consent form has been shared with the participants using E-mail. After that, a digital link to the video call has been shared with the participants. Total 5 questions are presented to the respondents and each interview process takes on an average of 15 minutes

to be completed. At the initiation of the interview, the researcher re-introduced the purpose of the research and the significance of the responses of selected participants. After closing the interview process, the researcher thanked the respondents for their participation.

3.2.3 Tools and Measures

The interview questionnaire is developed using 5 interview questions. The structured design of the questionnaire enabled the researcher to follow and pre-guided path of information gathering. The questions are developed using the close-ended approach. The close-ended interview questions enabled the researcher to collect valuable information from the participants while not be deviated too much from the context of the research question. A set of questions were asked regarding the existing CRM strategies that are used in the organisation along with the technical specificity of the CRM utilisation. Another set of questions is asked regarding the current loyalty level and engagement of the customers of the company. After that questions are asked regarding the relationship between the CRM strategies and Customer Loyalty while focusing on the mediator factors. Questions regarding the improvement of CRM have been also asked that can be used to increase customer retention. The questions were developed in a way so that the respondents can answer the questions based on their experience with the CRM system.

3.2.4 Data Analysis Procedure

The data analysis procedure should be selected based on the type of data collected through the data collection process. The collected data of this paper is based on the interview method and therefore, all collected data is qualitative. The transcript has been developed from the interview while transferring the audio of the interview to the text format. An intelligent verbatim transcription method has been used in this research. An intelligent verbatim transcription method has been used to ensure that the transcripts are adequately comprehensive while ensuring that the intention and the emission of the statement are intact. Since the interviews were conducted with Turkish consultants, they were conducted in Turkish. The transcript prepared in Turkish was translated into English by the researcher and the analyses were carried out in English.

The thematic analysis of the interview has been done in this research using the thematic coding procedure. For thematic coding of the transcript, MAXQDA software has been used. MAXQDA is a qualitative analysis software or computer application that helped the researcher

to reduce human error in the transcript coding method while increasing the scope of presenting the qualitative results through visual presentation (Marjaei, Yazdi. and Chandrashekara, 2019).

Data Analysing Steps:

Step 1: 10 transcript documents were imported in MAXQDA
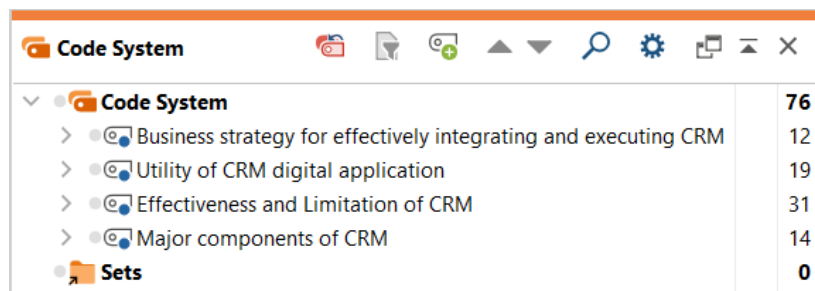
Figure 3.2.4.1 Imported transcripts in MAXQDA

Step 2: Coding was done for each response and segment

Figure 3.2.4.2 Codes and Sub-codes

Step 3: Codes were grouped into different themes

Figure 3.2.4.3 Code themes

Step 4: Thematic map was generated by the Creative Coding tool. (Please see *Figure 4.1.2. Thematic Map developed from transcript coding*)

Step 5: Code details were developed by using the Codes option and then the Subcode Statistics option

The thematic map has been developed to visualize the qualitative relationship within the different contexts of responses and their different aspects. The presentation has been done using separate themes where under each theme the discussion about the information found for the respective themes has been discussed.

3.3 Validity and Reliability, Subjectivity and Bias

The validity of research implies the appropriateness of the method that has been used and the source that has been selected to answer the research question (Sumrin and Gupta, 2021). In this study, the one-to-one interview method has been used in the process of data collection. An interview is a widely applicable and valid method in scholarly papers and business reports to examine the managerial, operational and functional aspects of a business or management theories. Therefore, the method that has been used for this paper is valid. Both measurable aspects have been considered in the interview process through code frequency to ensure triangulation, where both qualitative and measurable aspects of the interview response have been considered to ensure validity.

The reliability of a study implies the accuracy of the used method so that repeated execution of the study can generate similar results (Sumrin and Gupta 2021). The MAXQDA application has been used for the interview coding to avoid any human error that increased the reliability of this study. Considering the fact that the researcher has default knowledge of CRM technologies, it could impact the study method to increase subjectivity and bias in the transcription method. In order to avoid subjectivity and bias, the transcript responses were validated with the respondents to ensure appropriate interpretation of the responses.

3.4 Ethical Consideration

The ethical consideration of this paper is based on three major concerns namely the confidentiality of the data, the impact of research on participants' health and the willingness of the participants. The study has been developed using an online interview method so that any health implications can be avoided during the pandemic situation. The research does not have any impact on the mental and emotional health of the participants. The data handling of this paper is based on the privacy and security policy of the paper, where it has been ensured that no personal information of the participants is exposed in the study. Personal data has been destroyed after collecting the data through interviews. In order to ensure the willingness of the participants a consent form has been developed mentioning the purpose of the study, the process of participation, confidentiality concerns and others. It has been ensured that the participants can leave the interview session anytime they want. After receiving the acknowledgement in the consent form, the interview method has been executed.

3.5 Summary of Methodology

From the discussion of this methodology, it can be found that the chosen philosophy of this paper is Interpretivism where Customer Relationship Management and Customer Satisfaction and Retention and their relationship are interpreted with in-depth qualitative analysis. This paper is based on an inductive research approach. This paper is based on a cross-sectional qualitative research design. This paper is focused on the educational consultancy named Education State. Purposive sampling has been used to select the participants. The structured interview method has been used in this research to collect the data using open-ended questions. The interview questionnaire is developed using 5 interview questions. An intelligent verbatim transcription method has been used in this research. For thematic coding of the transcript, MAXQDA software has been used. It has been found that ethical consideration of this paper has been also ensured.

Chapter 4: Results and Findings

The purpose of this chapter is to present the findings after conducting the coding-based thematic analysis of the responses of the participants. In the following section, the outputs of the MAXQDA application have been presented along with the discussions based on the outputs. Both graphical and descriptive presentations of the data have been used in this findings section. The themes have been presented along with the thematic map to present the interconnections between different themes. The code distribution and the segments under each theme have been presented in the following section in order to analyse the responses based on the identified themes. The qualitative discussion of the themes has been also presented along with the segments of the supportive responses of the participants.

4.1 Data Collections and Theme Development

The data collection has been done within 28 days (Table 4.1.1). Each interview process took 15 to 37 minutes, however, the average time consumed by each interview is 23 minutes. Therefore, the interview process took an adequate amount of time that can help to collect in-depth information as per the chosen set of interview questions.

Table 4.1.1 Interview Process Details

Interviewee	Date of Interview	Duration
Manager 1	6/7/2022	15 minutes
Manager 2	8/7/2022	20 minutes
Manager 3	12/7/2022	17 minutes
Executive 1	15/7/2022	25 minutes
Manager 4	16/7/2022	30 minutes
Executive 2	22/7/2022	18 minutes
Executive 3	25/7/2022	22 minutes
Manager 5	27/7/2022	20 minutes
Executive 4	30/7/2022	37 minutes
Executive 5	2/8/2022	26 minutes
Total= 10	Total = 28 days	Avg= 23 minutes

After conducting the coding on the transcripts of the responses the thematic code map has been developed. The thematic map represents the relationships and connectivity within different

codes and sub-codes. Each branch of the code map (figure 4.1.1) implies each theme and the theme-related sub-codes within the responses. This figure was created from the MAXQDA's Creative Coding tool. It has been found that four major themes can be identified through analysing the responses. These themes are Major Components and Focus of CRM, Effectiveness and Limitations of Existing CRM, Utility of CRM digital application and Business Strategies for effectively integrating and executing CRM. Each theme contains more than 5 sub-codes.
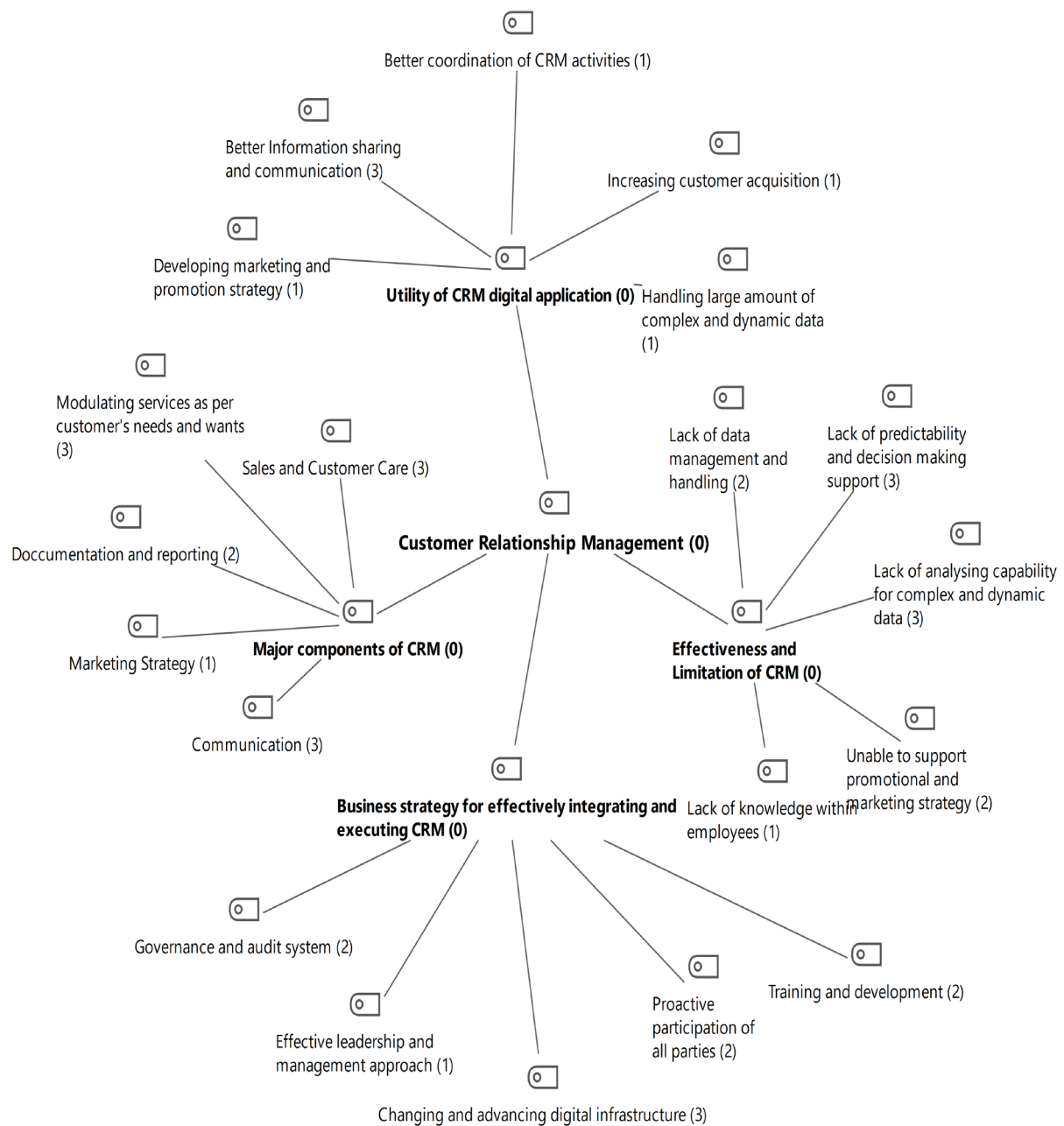

Figure 4.1.1 Thematic Map developed from transcript coding

4.2 Themes

Theme 1: Major Components and Focus of CRM

Theme 1 implies the findings from the responses regarding the major factors or the area of focus while executing the CRM system within the chosen organisation. As per the analysis, six major areas have been found (figure 4.2.1).

Table 4.2.1 Distribution of coded responses under theme 1

Major components of CRM
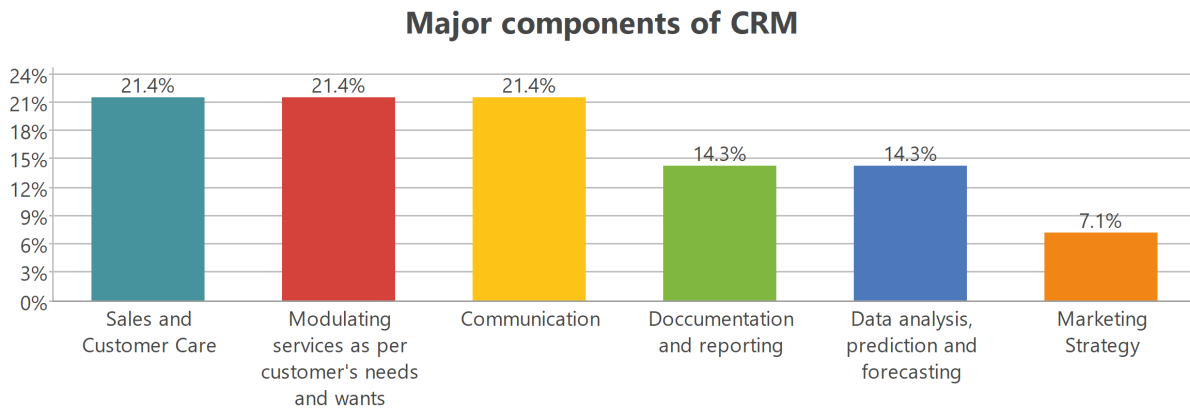
It has been found that sales and customer care are one of the major focuses of CRM activities. Executive 2 said that "Sales and customer care peoples hold the crucial part to guide the customers to the most satisfactory experience in their journey". Executive 4 also supports this fact by stating that the sales and customer care departments are very crucial for CRM. Modulating the service provided as per the customer's needs and wants has been found as another crucial factor. It implies that the focus of the CRM is to modulate the service as per customer needs and expectations. As said by Manager 5 "This type of information helps to understand customer needs and demand where company can module the service to meet client satisfaction". Executive 1 said that the CRM system "helps to understand customer needs so that we can develop and deliver the service accordingly".

Communication has been found as another crucial factor in CRM. It includes both business-to-customer and within-department communication. As per manager 5 "Our focus in customer relationship management is to ensure good communication with the customers. I think communication is needed before, during and even after delivering the services". As highlighted by Manager 3 they "focus on a different mode of communication so that the customer and the customer handling system both can reach each other easily while having different alternative options". Manager 2 highlighted that "communication is needed before, during and even after delivering the services". Documentation and reporting have been also found as the major focus

of CRM. As per manager 5 "documentation of the customer feedback and even the communication details with the communication is very crucial". Data analysis, prediction and forecasting through the CRM are also found as the major focus of the CRM. As per Executive 5 "The information gathering, analysing, predicting and forecasting are the major parts of this operation".

It has been also found that data analysis, prediction and forecasting are other set of essential components of CRM. Executive 5 said that "information gathering, analysing, predicting and forecasting are the major parts of this operation". Executive 3 added that the company "is focused on examining and analysing the customer data to develop suitable recommendations for providing the services and targeting the customers". Marketing strategies have been also found as a major component of CRM from the responses.

Theme 2: Effectiveness and Limitation of Existing CRM

The theme Effectiveness and Limitation of existing CRM imply the level of effective outcome that the chosen organisation (Education State), is currently having due to their existing CRM system. More than 10 factors have been found from the responses regarding the effectiveness and limitation of CRM (figure 4.2.2).

Table 4.2.2 Distribution of coded responses under theme 2

Effectiveness and Limitation of CRM
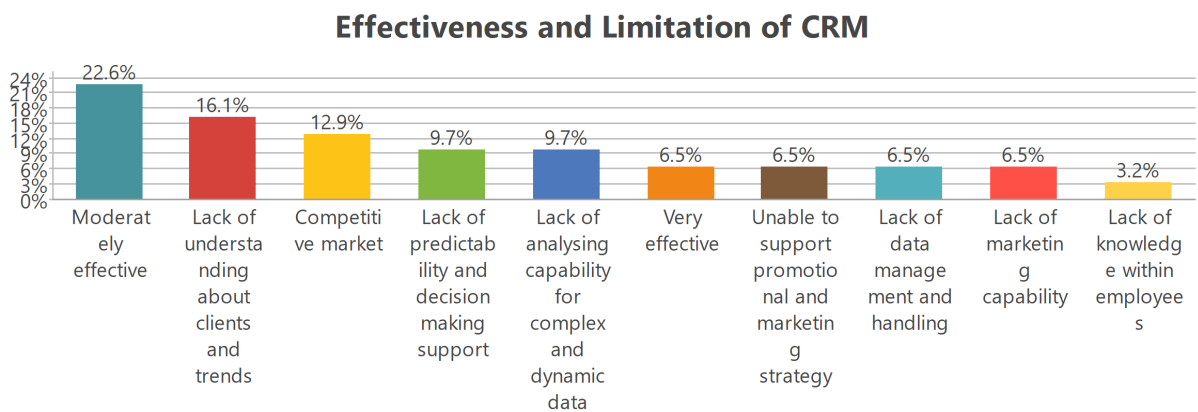
A strong proportion of responses supported that the existing CRM system is moderately effective with some advantages and limitations. As per Executive 4 "It is effective but has some minor inefficiencies". It has been also found that a lack of understanding of customer needs and trends of the market is a major limitation of existing CRM. As per Manager 3, "I have seen loopholes in recent customer acquisition abilities". Manager 3 also added that "lack of understanding about customer demand is reducing customer satisfaction and retention to some extent". Manager 2 added that "the increasing demand of the services sometimes make the

service inadequate". The competitive market has been also found as a major limitation. Manager 2 stated that "Some customers are having better alternative options and they are leaving". While supporting this issue manager 3 highlighted that "The competitors are increasing" and the company "do not have adequate understanding about the changing demand of the customers".

From the responses, it has been found that the existing CRM system is not enough to support the decision-making system appropriately through accurate prediction. It has been highlighted that the company do not have a better predictability system to make a decision. Execute 3 stated that "We are lacking data analytics and effective predictability about the market". Additionally, it has been found that sales forecast is not accurate or reliable at all. It has been found that the capability of analysing complex and dynamic information cannot be accurately done. Manager 4 stated that the company do not have adequate capability to conduct in-depth data analytics on the social media responses. Manager 4 also mentioned that "We are not able to do that because our system is not capable to examine mixed information that is basically languages, alphanumeric statements and others". Executive 10 said, "We are still using manual analysis process to analyse social media-based data."

Besides, lack of marketing capabilities, inadequate data management and handling, and lack of knowledge are other limitations. As per executive 4 "The market is rapidly changing along with the changing demand. Our current system is not adequate enough to track all changes effectively beforehand". As highlighted by Executive 1 "lack of knowledge within the users is blocking our capacity".

Theme 3: Utility of CRM digital application

The theme Utility of CRM digital application implies the ability of modernized digital CRM computer applications to serve CRM functionalities. From the responses (figure 4.2.3), 9 mention worthy responses have been received regarding CRM digital applications.

Table 4.2.3 Distribution of coded responses under theme 3

**Utility of CRM digital application**
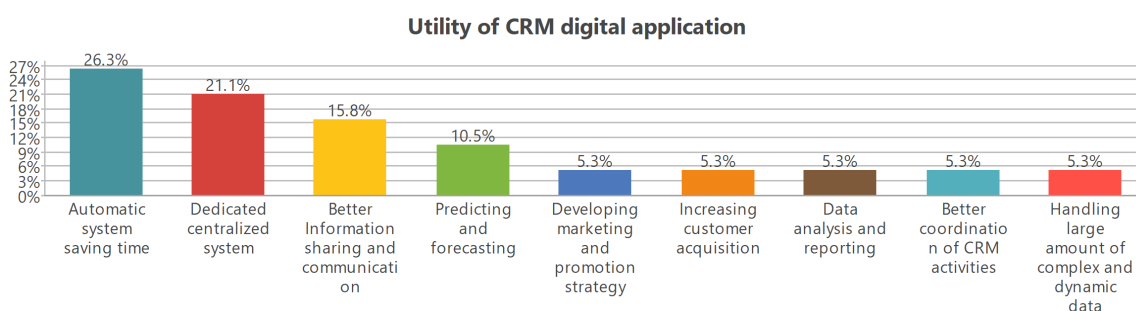
The major factor that has been highlighted for CRM digital application is that it has automatic system in it that saves time. As stated by executive 4 "It helps to automate the entire system that requires less effort and time to manage a large amount of data". Executive 3 further added that after implementing CRM digital system "less workforce is required to handle the customers and to ensure customer retention and acquisition". It has been found that it makes the process less complex and more time efficient and it increases the capability of analysing the market and customer demand in a short period of time. It has been also found that the digital CRM enables a dedicated system that centralized the entire customer relationship management operations. As per Executive 5 digital CRM application "enables a dedicated platform that integrates four core departments of customer relation such as sales, customer care, marketing, promotion". Manager 5 added that it "enabled a strong data handling platform that can handle the data from different departments very easily within a short time period".

It has been further highlighted that digitalized CRM enables a better information-sharing system across the organisational structure. Manager 1 stated that "It also can increase the communication and information sharing aspect exceptionally". Executive 2 supported that "It provides better information sharing and communication capabilities". It has been further found that digitalized CRM system enables better predictivity and forecasting. As per Executive 3 "In General, CRM can help to develop forecast about the future. It helps to make an effective decision". With this tool, the companies are finding the situational success factors to have the best customer satisfaction. It has been further found that CRM digitalization enables better development of marketing and promotional activities to acquire customers more effectively. It has been also found that data analysing and reporting become easy due to CRM digitalize system. Executive 4 mentioned that "it also helped us to understand the clients' complains and review for developing suggestive change to increase the service value".

Theme 4: Business Strategies for effectively integrating and executing CRM

The theme named Business Strategies for Effectively Integrating and Executing CRM implies the findings that are associated with administrative, managerial, change management and governance-related factors that are recommended for a company while integrating and executing CRM technologies. From the responses, six factors have been highlighted as the recommendations (table 4.2.4).

Table 4.2.4 Distribution of coded responses under theme 4
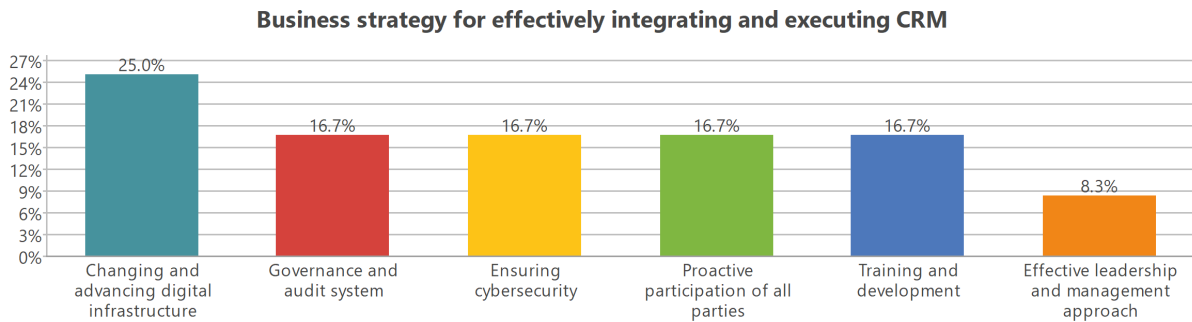
Business strategy for effectively integrating and executing CRM

It has been found that change management for advancing the digital infrastructure of the organisation is essential for adapting CRM. As mentioned by Manager 3 "The entire infrastructure of an organisation requires major changes to adapt CRM". However, if they already have a digitalized functional platform then it will not be a major issue. Executive 5 said that "An organisation should have proper internet system, devices, connectivity before switching to digital CRM". It has been also found that a company have to optimize the system with appropriate integration method to get the best outcome. From the responses, it has been found that governance and audit system is very essential for integrating and executing digitalized CRM. As per manager 5 "strong governance and audit system is essential for any company" and "It can help to identify the loopholes in the existing CRM system so that the required change can be made".

It has been highlighted by the respondents that ensuring cybersecurity is also essential. As per executive 3 "cybersecurity system should be the most essential point for any company". CRM holds valuable information about the company and market. Manager 4 added, "Without proper security, it can lead to data theft or ransom demand and a company can completely lose track". It has been found that the proactive participation of all parties is essential for the appropriate integration of digital CRM systems. Manager 2 said, "participation of employees, managers and CRM service providers is required in a very coordinated way". Training and development of the employees have been found to be the key factor of CRM integration. Executive 5 said that "We focus on training and development of the employees where they are being trained about how to use our digital CRM portals". As a supportive factor effective leadership and management strategies are also found essential for successful digitalized CRM integration and execution.

Chapter 5: Discussion

5.1 Discussion

As per the findings of this study, it can be said that through responses of the managers and executives' various new aspects of CRM have been found that can have mentioned worthy contributions in the context of the CRM system. In the following section, the findings of the study have been discussed with the already existing information collected from the literature review to answer the research questions.

The first question of this paper is: what are the major components of CRM that influence customer satisfaction and retention? It has been found that sales and customer care are the major focus of CRM activities. Modulating the service provided as per the customer's needs and wants has been found as another crucial factor. Ngelyaratan and Soediantono (2022), the key components of Customer Relationship Management include Sales, leading and reporting, marketing and customer service. Therefore, the findings of the study supported the already existing information in the literature. Communication has been found as another crucial factor in CRM. It includes both business-to-customer and within-department communication. Documentation and reporting have been also found as the major focus of CRM where that data analysis, prediction and forecasting are the major functionalities of CRM. According to Payne and Frow (2013), CRM highly influences the quality of experience of the customers to a great extent. Therefore, the predictivity and the service modulation factors of CRM are a new aspect of the subject of the CRM system. Developing appropriate marketing strategies to acquire new clients has been also found as a major component of CRM from the responses.

The second question of this paper is: how do the components of CRM have an impact on customer satisfaction and retention? It has been found that the current CRM system is moderately effective with some advantages and limitations. The lack of understanding of customer needs and trends of the market is a major limitation of existing CRM. The competitive market has been also found as a major limitation. It has been found that the existing CRM system is not enough to support the decision-making system appropriately through accurate prediction of the competitive market situation and changing trends in the education system. Malthouse *et al.* (2013) have highlighted, from the perspective of an organization, satisfaction, loyalty and profitability are the 3 key components associated with CRM. Therefore, this study highlights the new concept of predictability as the significance of the CRM system. It has been highlighted that the company do not have a better predictability system to make a decision.

Agrawal and Mittal (2019) have highlighted the efficiency and benefits of CRM-oriented web marketing. Therefore, the findings of the study additionally support the documentation and reporting system. The capability of analysing complex and dynamic information cannot be accurately done. Besides, lack of marketing capabilities, inadequate data management and handling, and lack of knowledge are other limitations.

The third question of this study is why CRM automation can help an educational consultancy named Education State to ensure customer satisfaction and retention. It has been found that CRM digital applications can enable an automatic system that can save time significantly. It has been found that it makes the process less complex and more time efficient and it increases the capability of analysing the market and customer demand in a short period of time. It helps to understand the clients' complaints and review for developing suggestive changes to increase the service value. Tien *et al.* (2019) have highlighted the importance of personalisation for retaining customers and CRM enables the company to provide the customers with a personalized experience. Therefore, it has been also found that digital CRM enables a dedicated system that centralized the entire CRM operations. It has been further highlighted that digitalized CRM enables a better information sharing system across the organisational structure that improves communications. According to Schultz *et al.* (2012), CRM allows an omnichannel communication experience for the customers which is a major reason behind customer satisfaction and effective customer retention. Therefore, it has been further found that digitalized CRM system enables better predictivity and forecasting to make an effective decision. It enables better development of marketing and promotional activities to acquire customers more effectively.

The fourth question of this research is whether CRM automation can be adapted to an educational consultancy. It has been found that change management for advancing the digital infrastructure of the organisation is essential for adapting CRM where proper internet systems, devices, and connectivity are required. A company have to optimize the system with appropriate integration method to get the best outcome. According to Agrawal and Mittal (2019) more personalised sales encounters result from more accurate data. Therefore, optimisation of the digital CRM system is very crucial for any organisation. From the responses, it has been found that governance and audit system is very essential for integrating and executing digitalized CRM while ensuring cybersecurity. Proactive participation of all parties is essential with strong coordination with each other departments. Training and development of the employees have been found to be the key factor of CRM integration.

Leadership and management strategies are also found essential supportive factors. Kampani and Jhamb (2020) have highlighted the importance of lead management as one of the major components of CRM. Therefore, the findings of the study support the already existing literature.

5.2 Implications of the Study

The findings of the study have both theoretical implications and practical implications. In terms of theoretical implication, it can be said that the relationship between CRM and customer satisfaction and retention has been highlighted in this paper. This relationship implies a theoretical association between CRM adaptation and customer satisfaction that will enable further research to be conducted on different conceptual aspects of customer handling and its impact on customer behaviour and attitude. This study also has major practical implications because it also focused on the implementation of CRM digitalization and automation system in organisational settings. This study highlights the existing challenges in the CRM system that can enable any organisation to identify its challenges in the CRM system. The technological adaptation of CRM and the significance of CRM applications that have been mentioned in this study can also prioritise the importance of the CRM digitalisation system and its adaptation. Additionally, this study also highlights the managerial, administrative and infrastructural recommendations for successful adaptation of CRM. These adaptation strategies can enable different organisations to develop their CRM adaptation plan effectively which can result in increased customer satisfaction and retention.

5.3 Limitation of the Study

As per the findings and discussion of the findings, it can be said that the paper has some major strengths. However, due to lack of scope, this study also has some limitations. The first major limitation of this study is its lack of generalizability. The study is based on a particular company named education state and therefore the findings are highly stipulated to the operational and strategic orientation of the organisation. This type of case-specific evaluation may not be highly applicable to the entire industry of educational consultancy. The second limitation of this paper is the lack of measurability. Considering the fact this paper is based on an interpretation of the impact of CRM on customer satisfaction and retention, the qualitative interpretivism approach has been used. As a result, the dependency of different customer satisfaction and retention-related factor on the different CRM applicability could not be presented due to a lack of specific measurability.

Chapter 6: Conclusion

6.1 Summary of the Study

CRM represents a collective functionality of strategies, practices and technologies to ensure the best customer experience through executing effective customer interactions and data management. With the globalisation of the education system and the changing economy, the number of international students and educational organisations is increasing rapidly. Along with that, the educational consultancy industry is also booming with high potential. The purpose of this paper is to find the relationship between CRM and customer satisfaction and retention, in order to evaluate the scope and strategies of utilising CRM automation in educational consultancy while using Education State as a case study. This study focuses on both functional aspects of CRM and the technological aspects while finding current limitations and recommendations for further improvement.

In order to accomplish this goal, this study has conducted a qualitative data collection and analysis process. The study focused on an education consultancy company named Education State, which provides constancy services for international students for their educational organisational selection and educational journey. A structured interview method has been used in this research to collect the data using open-ended questions. 10 managers and executives have been recruited for the interview sessions. The interview transcripts have been analysed through a coding-based thematic analysis process. The MAXQDA-based thematic analysis results have been presented and discussed in previous chapters. The purpose of this chapter is to conclude the study as per the findings and implications.

6.2 Linking to Objectives

The foal of the entire process of conducting the study is to meet its all objectives in order to accomplish the aim of the study. In the following section, the findings of the study have been linked to the aim of this study to accomplish the aim of this research.

The first objective of this research is to explore the major components of CRM that influence customer satisfaction and retention. As per the already existing paper, it has been found that Customer Support, Sales, Marketing, Service Delivery, and Records Analysis are the core components of CRM. The findings from the interview suggest that sales and customer care are the major components of CRM activities. Documentation and reporting-based data analysis, prediction and forecasting are the major functionalities. It has been found that marketing

approaches are also essential. Communication has been found as another crucial factor that includes both business-to-customer and within-department communication.

The second objective of this research is to examine the impact of the components of CRM on customer satisfaction and retention. As per the findings, it can be said that modulating the service provided as per the customer's needs and wants enables the CRM system to ensure client satisfaction and loyalty. It has been found that the international education market is changing rapidly and the lack of understanding of customer needs and trends of the market is a major limitation of existing CRM. The competitive environment of this industry can be managed through the appropriate execution of CRM while satisfying clients. However, the current systems are lacking complex and dynamic data analytics and predictive suggestion development. Through these factors, CRM can ensure customer satisfaction that can increase customer retention and loyalty.

The third objective of this research is to evaluate the benefit of using CRM automation for educational consultancy named Education State to ensure customer satisfaction and retention. It has been found from the study that CRM automation makes the process less complex and more time efficient and it increases the capability of analysing the market and customer demand in a short period of time. It enables a complex and dynamic data management system for clients' complaints and reviews for developing suggestive changes to increase the service value. Digitalized CRM enables a better information sharing system while making the system centralized. Accurate forecasting and predictive decisions can be made through digitalized automated CRM that allows better decision-making in marketing, promotion and service-providing system.

The fourth objective of this research is to determine the strategy and scope of adopting CRM automation in an educational consultancy. The study shows that advancing the digital infrastructure of the organisation is essential for adapting CRM where a proper internet system, devices, and connectivity are required. Appropriate change management is required for optimization and integration of the system where the governing and cybersecurity system should be also the core part of the digitalized CRM system adaptation. Training and development of the employees have been found as the key factor of CRM integration where the leadership and managerial approaches are highly supportive factors to ensure the effectiveness of CRM and digitalized automation system.

6.3 Conclusive Statement

As per the entire study, it can be concluded that sales and customer care are the major components of CRM activities. The data reporting, analysis, prediction and forecasting are other essential part of CRM that enables the appropriate development of marketing and promotional plan. It has been found that communication is very essential to successfully running CRM. It can be concluded that CRM can help to modify the services and customer relation according to the customer needs and wants that increases customer satisfaction and retention. Through analysing complex and dynamic data collected from customers the digital CRM helps to generate competitive strategy in a rapidly expanding and changing market like education.

It can be also concluded that this study found the relationship between CRM and customer satisfaction and retention with the evaluation of the scope and strategies of utilising CRM automation in educational consultancy while using Education State as a case study. Through the qualitative analysis and interpretation, this study also accomplished its all objectives.

Digital CRM adaptation can be very beneficial for any educational consultancy organisation because it automates complex and dynamic CRM procedures while ensuring a centralized and transparent information-sharing platform. It can be further concluded from the study that a business should develop the digital infrastructure with proper internet system, devices, and connectivity with proper change management for a digitalized CRM system. Training and development of the employees are very crucial along with appropriate leadership and management methods. The governance and cybersecurity system should be also strong for digital CRM adaptation where participation and communication of primary stakeholders are essential.

6.4 Future Scope of Research

As per the existing findings and implications of this study, it can be said that further research will be required to understand the impact of CRM with more generalizability. In future, a study can be conducted on multiple organisations so that the effectiveness of CRM could be understood with less subjectivity or bias. In order to increase the measurability and specificity of the information regarding the relationship of different aspects of customer satisfaction, behaviour and attitude with the different implementation CRM systems quantitative research can be conducted. In quantitative research, the observational data from the business records and annual reporting can be used for statistical analysis. Additionally, survey-based research

can be conducted to find executional issues in a digitalized CRM system for educational consultancy organisations.

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Appendices

Appendix A: Consent Form

Topic of Interview: The role of Customer Relationship Management on customer retention and customer satisfaction in educational consultancy: A case of EDUCATION STATE

Purpose of the Research:

The purpose of this research is to find the relationship within CRM and customer satisfaction and retention, in order to evaluate the scope and strategies of utilising the CRM automation in educational consultancy while using Education State as case study.

Obligations of the study

- The personal information of participants will not be exposed in the research and it is the subject to the Data Privacy and Security ACT

- Participants can leave the interview anytime they want

- This research does not have any financial, health or any other kinds of benefits for the participants

- The participants will not be at risk in any terms (health or others) in this study

- A copy of the complete research paper will be shared to the participant

- The responses of participants will only be used in this paper and nowhere else

I hereby declare that I have read the above obligations and I am willingly participating in this study as per the obligatory protocols stated above.

…………………………………………..

Signature of Participant

Appendix B: Interview Protocol

Topic of Interview: The role of Customer Relationship Management on customer retention and customer satisfaction in educational consultancy: A case of EDUCATION STATE

Responsibilities of Interviewer:

•   Communicating with interviewee

•   Respecting interviewees personal space

•   Show proficiency

•   Taking care of interviewee's consent and willingness

•   Informing the interviewee adequately

•   Recording the Interview

Induction with Interviewee:

Hello, I am the interviewer. As we have already informed you that we need your valuable insight regarding CRM and its impact on customer satisfaction and retention. If you have any concern and question please do not hesitate to share that. Then we will proceed with the interview.

Interview Questions:

Q1: What is the major focus of customer relationship management process while being executed in Education State?

Q2: How much effective is the existing customer relationship management process for the customer satisfaction and retention in Education State?

Q3: What are the major limitations and challenges in customer relationship management process while ensuring customer satisfaction and retention in Education State?

Q4: How do you think CRM digital applications and automation can help Education State to overcome customer relationship management and customer dissatisfaction and attrition related limitations and challenges?

Q5: What are the crucial factors of adapting CRM digital applications and automation in terms of implementation strategies, administration methods, change management and other practical aspects?

Ending Interview:

Thank you so much for your valuable time that you have given for this interview. Your information is really helpful for the research. Have a nice day.

Appendix C: Interview Questionnaire

<u>Interview Questions</u>

Q1: What is the major focus of customer relationship management process while being executed in Education State?

Q2: How much effective is the existing customer relationship management process for customer satisfaction and retention in Education State?

Q3: What are the major limitations and challenges in customer relationship management process while ensuring customer satisfaction and retention in Education State?

Q4: How do you think CRM digital applications and automation can help Education State to overcome customer relationship management and customer dissatisfaction and attrition related limitations and challenges?

Q5: What are the crucial factors of adapting CRM digital applications and automation in terms of implementation strategies, administration methods, change management and other practical aspects?

Appendix D: Example Transcript (Interview 8 Executive 3)

Q1: What is the major focus of customer relationship management process while being executed in Education State?

Our CRM system is focused on examining and analysing the customer data to develop suitable recommendations for providing the services and targeting the customers. Sales and customer care are also a very crucial part of our CRM that deals with the customers from start to end of the customer journey.

Q2: How much effective is the existing customer relationship management process for customer satisfaction and retention in Education State?

I think it is moderately effective. We still lack detailed visibility about the existing market and customer trends.

Q3: What are the major limitations and challenges in customer relationship management process while ensuring customer satisfaction and retention in Education State?

We do not have a better predictability system to make a decision. We are lacking data analytics and effective predictability about the market. Additionally, our sales forecast is not accurate or reliable at all.

Q4: How do you think CRM digital applications and automation can help Education State to overcome customer relationship management and customer dissatisfaction and attrition-related limitations and challenges?

In general, CRM can help to develop forecasts about the future. It helps to make an effective decision. Additionally, it also helps in automating the system, so that less workforce is required to handle the customers and to ensure customer retention and acquisition.

Q5: What are the crucial factors of adapting CRM digital applications and automation in terms of implementation strategies, administration methods, change management and other practical aspects?

In this situation, a cybersecurity system should be the most essential point for any company. CRM holds valuable information about the company and market. Without proper security, it can lead to data theft or ransom demand and a company can completely lose track.

Appendix E: MAXQDA Process

Appendix F: Code System

Code System	Memo	Frequency
Code System		76
CRM		0
Business strategy for effectively integrating and executing CRM		0
Business strategy for effectively integrating and executing CRM\Ensuring cybersecurity		2
Business strategy for effectively integrating and executing CRM\Governance and audit system		2
Business strategy for effectively integrating and executing CRM\Effective leadership and management approach		1
Business strategy for effectively integrating and executing CRM\Changing and advancing digital infrastructure		3
Business strategy for effectively integrating and executing CRM\Proactive participation of all parties		2
Business strategy for effectively integrating and executing CRM\Training and development		2
Utility of CRM digital application		0
Utility of CRM digital application\Handling large amount of complex and dynamic data		1
Utility of CRM digital application\Increasing customer acquisition		1
Utility of CRM digital application\Better coordination of CRM activities		1
Utility of CRM digital application\Better Information sharing and communication		3
Utility of CRM digital application\Developing marketing and promotion strategy		1
Utility of CRM digital application\Predicting and forecasting		2
Utility of CRM digital application\Data analysis and reporting		1
Utility of CRM digital application\Automatic system saving time		5

Code System	Memo	Frequency
Utility of CRM digital application\Dedicated centralized system		4
Effectiveness and Limitation of CRM		0
Effectiveness and Limitation of CRM\Lack of knowledge within employees		1
Effectiveness and Limitation of CRM\Unable to support promotional and marketing strategy		2
Effectiveness and Limitation of CRM\Lack of analysing capability for complex and dynamic data		3
Effectiveness and Limitation of CRM\Lack of predictability and decision making support		3
Effectiveness and Limitation of CRM\Lack of data management and handling		2
Effectiveness and Limitation of CRM\Lack of marketing capability		2
Effectiveness and Limitation of CRM\Very effective		2
Effectiveness and Limitation of CRM\Competitive market		4
Effectiveness and Limitation of CRM\Lack of understanding about clients and trends		5
Effectiveness and Limitation of CRM\Moderately effective		7
Major components of CRM		0
Major components of CRM\Data analysis, prediction and forecasting		2
Major components of CRM\Sales and Customer Care		3
Major components of CRM\Modulating services as per customer's needs and wants		3
Major components of CRM\Doccumentation and reporting		2
Major components of CRM\Marketing Strategy		1
Major components of CRM\Communication		3