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## A STUDY ON THEORETICAL ASPECTS OF DEVELOPING SYSTEMS FOR CUSTOMER RELATIONSHIP MANAGEMENT AS AN ALTERNATIVE DIRECTION OF DEVELOPMENT OF THE MARKETING ACTIVITY FOR MACHINE-BUILDING ENTERPRISES

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### Rodionov S. O. A Study on Theoretical Aspects of Developing Systems for Customer Relationship Management as an Alternative Direction of Development of the Marketing Activity for Machine-Building Enterprises

*The article considers a theoretical analysis of systems for customer relationship management, which serve as an alternative direction of development of the marketing activity of machine-building enterprises. It was determined that CRM information systems are the most relevant and promising tools towards management and building relationships with customers for machine-building enterprises. The article considers and generalizes the evolutionary aspect of information technologies and their impact on the production processes of enterprise, particularly on the marketing activities. The approaches to defining the essence of the notion of 'CRM' were analyzed and a definition of this notion has been proposed. The both distinctive characteristics and common features of the information systems for customer relationship management were studied, systematized and classified. The author has proposed some supplement to the classification presented.*

**Key words:** development of marketing activity, machine-building enterprise, CRM system, systems for customer relationship management, Internet technologies.

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### Родіонов С. О. Дослідження теоретичних аспектів розвитку систем управління відносинами зі споживачами як альтернативного напрямку розвитку маркетингової діяльності підприємств машинобудівної галузі

*Стаття присвячена теоретичному аналізу систем управління відносинами зі споживачами, які виступають альтернативним напрямком розвитку маркетингової діяльності підприємств машинобудівної галузі. Визначено, що для машинобудівного підприємства в напрямку управління та побудови відносин зі споживачами найбільш актуальними та перспективними інструментами виступають інформаційні системи класу CRM. Розглянуто та узагальнено еволюційний аспект інформаційних технологій та їх вплив на виробничі процеси підприємства, зокрема на маркетингову діяльність. Проаналізовано підходи щодо визначення сутності поняття «CRM» і запропоновано своє визначення цього поняття. Досліджено, систематизовано та класифіковано відмінні особливості та спільні ознаки інформаційних систем управління відносинами зі споживачами. Автором запропоновано доповнити представлену класифікацію.*

**Ключові слова:** розвиток маркетингової діяльності, машинобудівне підприємство, CRM-система, системи управління відносинами зі споживачами, Інтернет-технології.

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### Родионов С. А. Исследование теоретических аспектов развития систем управления отношениями с потребителями как альтернативного направления развития маркетинговой деятельности предприятий машиностроительной отрасли

*Статья посвящена теоретическому анализу систем управления отношениями с потребителями, которые выступают альтернативным направлением развития маркетинговой деятельности предприятий машиностроительной отрасли. Определено, что для машиностроительного предприятия в сфере управления и построения отношений с потребителями наиболее актуальными и перспективными инструментами выступают информационные системы класса CRM. Рассмотрен и обобщен эволюционный аспект информационных технологий и их влияние на производственные процессы предприятия, в частности на маркетинговую деятельность. Проанализированы подходы относительно определения сущности понятия «CRM» и предложено свое определение этого понятия. Исследованы, систематизированы и классифицированы отличительные особенности и общие признаки информационных систем управления отношениями с потребителями. Автором предложено дополнить представленную классификацию.*

**Ключевые слова:** развитие маркетинговой деятельности, машиностроительное предприятие, CRM-система, системы управления отношениями с потребителями, Интернет-технологии.

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In today's world the success of an enterprise depends not only on its capabilities in manufacturing and sales, but primarily on innovation, knowledge, on availability of information resources and on the ability to correctly use these resources to enhance competitive advantage of an enterprise.

Today's conditions for management of domestic enterprises of machine building industry are characterized by complex levels of technological and economic development of enterprises; by increased competition on the market of machine building products; by difficult situation in the country. Moreover, the crisis leads to the fact that from a macroeconomic point of view enterprises are at a very low level. Optimization of costs serve as the direction of improving the marketing activities in these conditions for machine building enterprises, i. e. enterprise's budget on the development of Internet technology should be distributed in a way that significantly optimizes costs on information and communication technology. That is why it is important to attempt exploring the theoretical aspects of the development of customer relationship management systems, which serve as Internet-based information and communication technology. In turn, the use of Internet technology today is one of the most promising and attractive areas for marketing activity of the machine building enterprises. These are the reasons explaining the relevance of the research topic.

Review of theoretical aspects of customer relationship management systems has already been reflected in the works of local and foreign authors to some extent: I. Kryvovvaziuk, V. Roshkevich, R. Strilchuk [16], M. Vasilevski [6], M. Vysotska [7], D. Doroshkevich [10], S. Safronova [21], S. Kartyshov, I. Kulchitska, N. Potashnikov [14], L. Martynuk [17], Yu. Merezha [18] (nature of customer relationship management and their influence on enterprise's marketing activity), V. Gevko [8], A. Karminskiy, B. Chernikov [13], A. Payne [19], M. Kadikov [12], J. Dyche [9], I. Ushakova, S. Panasenko [24], T. Dubovik [11], N. Bulava [5] (classification features, types of customer relationship management on individual characteristics), I. Sincheskul, M. Larka [22] (customer relationship management on machine building enterprises) and others. Works of these authors cover basic theoretical concepts on research problems of the theoretical aspects of customer relationship management and only some of the factors of their influence on machine building enterprises. However, the researchers reasonably indicate that this is only the beginning of systematic studies that require further development.

The paper is to analyze the existing theoretical aspects of information and communication technology and grounding for directions of marketing activity of machine building enterprises. According to the specified objective there are following tasks:

- ✦ review and generalization of the evolutionary aspect of information technology and its impact on enterprise manufacturing processes, particularly on the marketing activities;
- ✦ defining the essence of the notion of «Customer Relationship Management» (CRM);
- ✦ generalization and systematization of the existing classifications of customer relationship management information systems.

Today one of the most prospective directions of marketing activity of the machine building enterprises is the use of Internet technology. This is reflected in the use of Internet communication possibilities, tools for competitor study, analysis of customer preferences, behavior of potential customers, allowing enterprises, using modern technology to conduct their business, to increase competitiveness and develop new outlet markets, expand the range of goods and services according to market needs [23].

For a long time the role of complex influence on customers for success in the industrial market (B2B) was underestimated by domestic machine building enterprises. However, intensifying competition required enterprises to spend money on creating new products, but as you may know, machine building manufacturing is a complex, knowledge-intensive and long process. And the struggle for clients forced the enterprises to think about the possibility of maintaining long-term relationships with customers [22].

For machine building enterprises the most relevant and promising tools towards management and formation of relationships with customers are the CRM (Customer Relationship Management) information systems.

Systems of customer relationship management have undergone many development stages and evolved a lot. The first generation of CRM-systems technology at the beginning of the development came down to the notion of MRP (Manufacturing Resource Planning) and acted only as an automation method for planning the requirements in materials and manufacturing resources of an enterprise.

The present generation of technology focused on the Internet. Internet serves as not only a tool of information exchange with customers, but also as an additional platform for sales, marketing, promotion and customer service. At the same time it increases the quality of interaction of customers with the enterprise. Thus, CRM-systems for many enterprises are the key factor of success.

In general, the CRM-system can be considered as an Internet-based information technology, so it is reasonable to review and summarize the evolutionary aspect of information technologies and their impact on enterprise manufacturing processes, particularly on the marketing activities (Table 1).

Of course, the development of information technologies in enterprise management did not stop after 2008, each of the presented systems continues to increase functionality to this date. Development companies have to make great effort in the competition to win a leading position in the market. However, if we talk about global changes – there were none. Most of the changes can be expressed in uniting of some aspects of enterprise management, the specifics of the enterprise, as well as more detailed emphasize on the qualitative characteristics of a particular product.

Today, more and more leading experts in the field of information technology and managers convince to expand the notion of «CRM-system». There was lots of evidence found for that CRM-system has long gone beyond bring just a program product. Instead, this notion developed into a concept aimed at building a stable business relationship with clients and, moreover – a business strategy aimed at

Evolution of information and Internet technologies and their impact on enterprise management

Year	Development of information technology in enterprise management	Development of marketing communication processes	Impact of information technologies on manufacturing processes
1960	MRP (Manufacturing Resource Planning) – management of planning of material requirements of an enterprise	–	Combining all the major functional areas of an enterprise at the operational level
1970	MRP II – planning of manufacturing resources ensuring operational and financial planning of an enterprise	–	
1980	ERP – Enterprise Resource Planning	Formation of sales plans and manufacturing plans based on marketing information	Automation of enterprise management information system for resource planning
1986	AST (Automated System of Testing) – the first application for contact management	Marketing targets individual customers	Simplifying of business processes management
1990	SFA (Sales Force Automation) – sales management; contact management	Contact base and contractor base management	
1995	CRM – Customer Relationship Management	Support for effective marketing, in the center of the whole philosophy – a customer with his individual preferences	Acts as business strategy, increases the effectiveness of individual and teamwork
1999	eCRM (electronicCRM) – this is CRM using information technology, including extranet, intranet and the Internet; often used in e-commerce	Aimed at the development and analysis of Internet marketing; used throughout the interaction between an enterprise and a customer	Acts as a self-service function
	mCRM (mobileCRM) – customer relationship management designed for performance, operation and access via mobile platforms	Sales managing and marketing managing via mobile applications requiring frequent remote access	The interface is similar to the stationary CRM
	SaaS CRM (Software-as-a-ServiceCRM) – customer relationship management under which the supplier develops and manages the program on his own, providing access to software online	–	Absence of costs associated with installing, upgrading and support of hardware and software
2000	eBRM (electronicBusinessRelationship Management) – relationship management not only with customers but also with partners and employees based on Internet communications	Marketing takes into account information not only about customers but also about partners, employees	Transferring of manufacturing processes to external entities; reducing costs through management of electronic business transactions; reducing costs for information transfer
2001	eXRM (eXtendedRM) – advanced relationship management (classic CRM + service management + project management + resource management)	Marketing is more detailed, as it includes additional information	
2003	CEM (CustomerExperienceManagement) – management of customer preferences and past orders	Marketing focuses on customers' past experience	Mutually beneficial interaction between a customer and enterprise, product, brand or service leads to optimization of manufacturing processes
2004	CRM 2.0 – customer acts as corporate strategy	Marketing aimed at creating product value or service value, the customer is involved in creating the product or service	
2008	SRM (SocialCRM) – the use of social networks and instant messaging		Creation of a unified global society leads to simplifying and optimization of certain aspects of an enterprise activity

the use of advanced management and information technologies, with the help of which the enterprise collects information about its customers at all stages of its life cycle (attraction, retention) and uses it for the benefit of its businesses by building mutually beneficial relationships [18].

So defining the essence of the notion of customer relationship management (CRM) is one of the most important tasks for grounding the relevance of the introduction of information and communication technologies in a machine building enterprise.

Literature review showed that all definitions of CRM have several features in common, in particular, focusing on getting significant positive effects in the long term, satisfying the needs of customers and providing the collection, saving and analysis of internal and external information on market participants and the relationships with them (Fig. 1).

Thus, it is appropriate to define the essence of the notion 'CRM' as any strategy for managing relationship with customers.

The author gives his definition for «CRM-system» – it is an information system of relationship with customers aimed at ensuring the coordination of actions of various departments of the enterprise, whose aim is to optimize revenues, profitability and customer satisfaction based on a common information platform.

A distinctive feature of the current stage of development of information systems of interaction with customers through the Internet is assuring the access to strategic enterprise resources for all users, maximally maintaining their mobility and values. Internet system of interaction with customers allows a machine building enterprise to reduce transaction costs by creating a common information space,

which, together with the finance, manufacturing, logistics and human resources are the most important strategic resources of an enterprise [20].

Many authors, scientists and leading experts have made a significant contribution to the theoretical study of distinctive features, common features, systematization and formation of classification for information systems of customer relationship management. But, despite this, there was no generalized and extended classification presented.

Modern information systems managing relationship with customers form the knowledge base and can create new and improve existing products and services and thus improve the market position of the machine building enterprise and thus its financial results. The evolution and development of CRM program products led to the emergence of a variety of species, however, different sources present different signs and different types of classification for individual characteristics [8].

The purpose of classification of existing CRM-systems is not so much their comparative analysis, but rather a detailed study and selection of the defining criteria. In order to

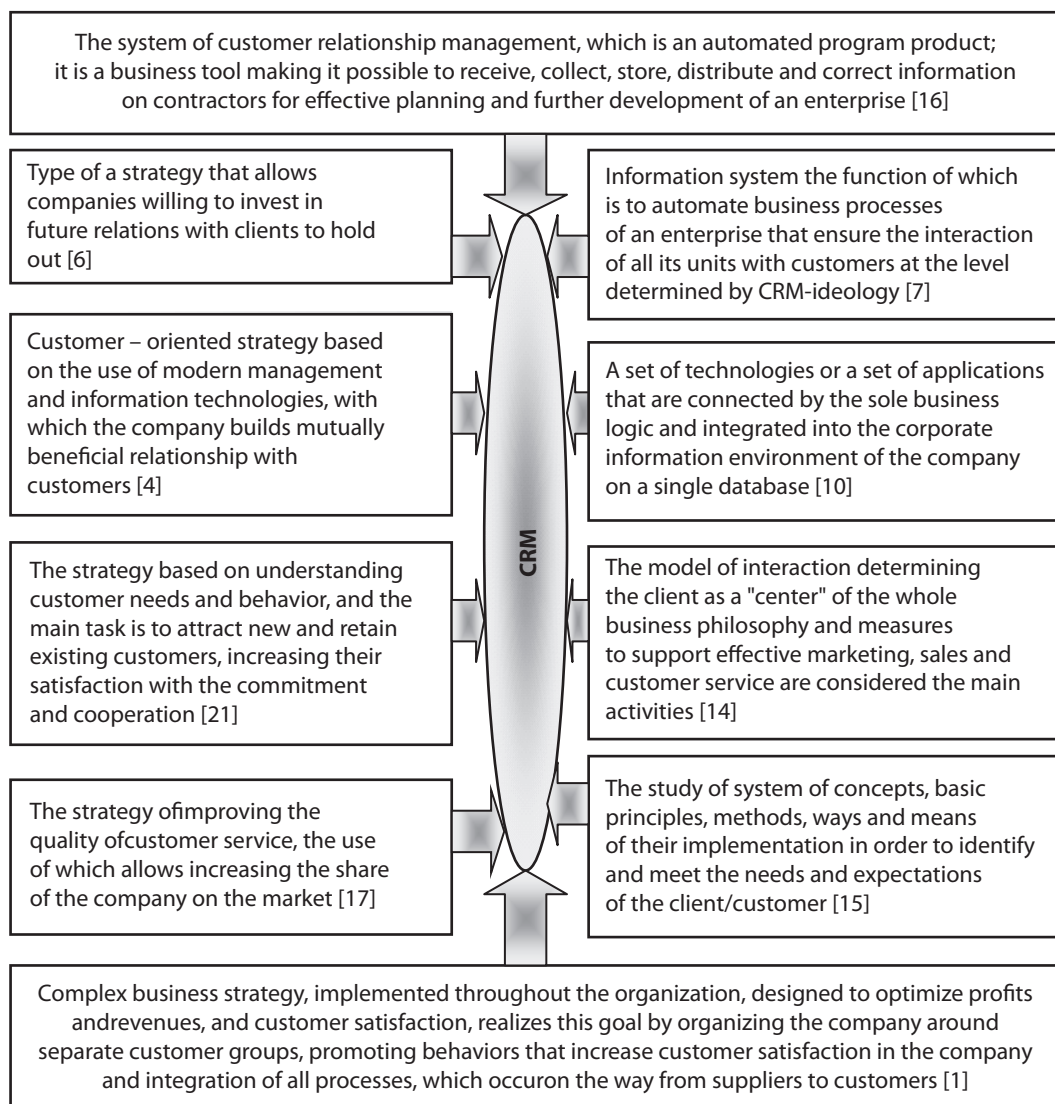


Fig. 1. Views on the essence of the notion of «CRM»

enable implementation of concepts of customer relationship management in practice, CRM program product must meet these criteria.

Thus, it would be rational to classify information systems of customer relationship management basing on sys-

tematizing the existing features and supplementing by features offered by the author (*Table 2*).

Systems of customer relationship management are aimed to minimize the human factor in the process of working with customers. They act as a key tool for winning and

**Table2**

**Extended classification of Information systems of customer relationship management**

Classification	Types of CRM	Source
By functions performed	<ul style="list-style-type: none"> <li>- operational;</li> <li>- analytical;</li> <li>- combined (collaborative)</li> </ul>	[12, 13, 19]
By scope	<ul style="list-style-type: none"> <li>- financial;</li> <li>- commercial;</li> <li>- manufacturing;</li> <li>- for service industry</li> </ul>	
By implementation level	<ul style="list-style-type: none"> <li>- unifunctional;</li> <li>- multifunctional;</li> <li>- system;</li> <li>- integrated</li> </ul>	[9]
By the way of using information technologies	<ul style="list-style-type: none"> <li>- mobile (M-CRM);</li> <li>- electronic (E-CRM)</li> </ul>	[2]
By location and ownership	<ul style="list-style-type: none"> <li>- stationary (owned server);</li> <li>- rented (on the basis of SaaS (Software-as-a-Service))</li> </ul>	[2, 3]
By the process of cooperation with the client	<ul style="list-style-type: none"> <li>- Front-office (sales management, service and marketing tasks formalized);</li> <li>- Back-office (order processing, logistics, settlements; activity control)</li> </ul>	[24]
By mechanism integration	<ul style="list-style-type: none"> <li>- functional – controls certain mechanisms;</li> <li>- instrumental – combines mechanisms to strengthen each other</li> </ul>	[11]
By the nature of service	<ul style="list-style-type: none"> <li>- internal;</li> <li>- outsource;</li> <li>- combined</li> </ul>	[8]
By the degree of integration with existing information system of an enterprise	<ul style="list-style-type: none"> <li>- separate CRM-modules;</li> <li>- autonomous;</li> <li>- full</li> </ul>	
By type of access to database	<ul style="list-style-type: none"> <li>- open;</li> <li>- closed;</li> <li>- on request;</li> <li>- remote;</li> <li>- differentiated</li> </ul>	
By formation	<ul style="list-style-type: none"> <li>- CIF-systems (collection of reference information about customers from diverse sources);</li> <li>- SFA-systems(automation of Sales and Marketing operational processes);</li> <li>- Service Desk (providing support for operational processes of customer service);</li> <li>- Contact-center (handlingcontactswithrealandpotentialcustomer sforsalesandserviceviaanyelectronicinteractionchannels);</li> <li>- Analytical CRM (for accumulation, storage, aggregation and mental processing of technology indicators collected on the basis of transaction systems)</li> </ul>	[5]
By payment method	<ul style="list-style-type: none"> <li>- single use (unlimited);</li> <li>- partial (for the period);</li> <li>- for every user</li> </ul>	Author's classification
By basic capabilities	<ul style="list-style-type: none"> <li>- interaction with clients;</li> <li>- sales coordination;</li> <li>- marketing activities management;</li> <li>- service and Call-centers</li> </ul>	
By the way of segmenting customers	<ul style="list-style-type: none"> <li>- the level of emotions, impressions;</li> <li>- participation in product design;</li> <li>- creating customer value</li> </ul>	



retaining customers and allow qualitatively increase the effectiveness of marketing activities in the machine building enterprise, sales and customer service.

As it was discovered earlier, systems of customer relationship management have existed in the information technology market long ago. They evolved, developed and changed under the influence of innovative components of Internet technologies. But the main scope of CRM-systems is still marketing activity. CRM-system has more functional components than any other information system for marketing activities, as it is designed for complex management of relations with customers, which is a part of the marketing activities.

If we consider the CRM-system to be an information system that aims to manage marketing activities, it is able to analyze simultaneously many business processes, to instantly respond to changing information about customers and contractors, to optimize strategic and operational planning, to propose, based on the situation, different marketing strategies, to monitor and analyse the activity of machine building enterprise and to report on a wide variety of settings.

## CONCLUSIONS

Thus, systems of customer relationship management act as strategic tools and the most promising means of increasing the efficiency of management of marketing activity of a machine building enterprise based on Internet technology. Given the global trend towards CRM systems and taking into account the fact that the human resource is not a trusted and reliable way of storing and processing information of customer relationship management, these are the most important driving elements of the growth of marketing potential, which in turn, promotes the growth of competitiveness of domestic machine building enterprises.

Further research in this field should be directed to the specific program systems managing relationships with customers for certain enterprises taking into account the conditions of their management and studies on the effect of their implementation in machine building enterprises. ■

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