CULTURAL DIMENSIONS AND CRM SYSTEMS: A CROSS-CULTURAL CASE STUDY

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Abstract

Cultural dimensions are often identified as a crucial influence on the success or failure of Information Systems in general and Customer Relationship Management Systems (CRM) in particular. Several researchers have suggested ways in which management can accommodate these dimensions or solve the problems they may pose. Ali& Alshawi (2005) have proposed a cultural concerns framework for the management of CRM systems implementation in the multinational environment. In this paper the authors test that framework by conducting a qualitative comparative case study in a large multinational organization in two countries. The authors have investigated the implementation of CRM systems within the same organization in both Egypt and the UK. Using observation, document analysis and interviews, qualitative data has been elicited and used a Soft Systems Methodology (SSM) analysis to determine themes for each case study. The result is a framework of cultural dimensions for management of CRM systems, within multinational environment organizations.

Keywords

CRM, Culture, Cross-Cultural, Qualitative, Case Study, Soft Systems Methodology, Structuration Theory, UK, Egypt.

1.   INTRODUCTION

In a competitive market, companies try to build a relationship with their existing customers as the cost of attracting new customers is higher than retaining these existing customers. To build a relationship with customer is a socio-technical process. The most important factor in that process is to understand how that customer values, norms, thoughts, perceptions, etc., are alike. Multinational organization deal with customers from many different cultures. CRM systems in multinational organizations are built to attract new customers, increase customers' value and retain customers, and in all cases these may be with different customers and from different cultures.

Hofstede's cultural dimensions are the most cited reference about culture within IS literature (McCoy 2003). Ali, and Alshawi (2005) have proposed a comprehensive cultural dimensions framework, including Hofstede's cultural dimensions, through a normative survey of the culture literature within and outside of IS literature. In this paper the authors test that framework by conducting a comparative qualitative case study in a large multinational organization in two different countries, Egypt and UK. The authors use a Structurational analysis (based on concepts of Structuration Theory (ST) by Giddens (1979, 1984)) to derive the cultural dimensions which may influence the CRM implementation and operation in a multinational environment.

The structure of this paper is as follows: in section two explores the problem background. It summarises literature about culture within IS, briefly explores the background literature on Structuration Theory within IS and then highlights Structuration Theory as a way of looking at social and cultural phenomena within the IS discipline. The research problem explicitly deals with social construction and so calls for an interpretative research approach which is detailed in section three. This includes a description of the qualitative comparative case study conducted in a commercial multinational company in Egypt and the UK. Section four discusses SSM as way of asking questions about the real world case study. Combining the resulting qualitative data analysis with ST allows the development of themes within each case study. This can then be used as a basis to validate Ali and Alshawi (2005) cultural dimensions framework for the management of CRM implementation and operation in the multinational environment. Finally, section five concludes with a summary and proposing directions for possible future research.

2. RESEARCH BACKGROUND

The literature on culture provides a set of general concepts and ideas as a way of looking at the world. However, the typologies of culture have inherent weaknesses e.g. they do not reflect the variety of values and attitude that may exist in a country, nor do they explain how cultures have developed over time. These limitations will need to be borne in mind, when considering the potential impact of culture on the use of information systems, particularly CRM systems (Skok and Legge 2001).

Stahl (2003) distinguished between two different dimensions of culture. The first proposes that different cultures are fundamentally and possibly irreconcilably different, whereas the second proposes that all cultures share some universal attributes. These two ideal-typical positions appear to be different shades of grey. Stahl has concludes that, despite obvious difference in cultures, there are similarities that are based on human nature. There are three identified types of culture that are of relevance (Ali & Alshawi, 2004a). First, there is culture that a society shares (national culture), a set of core values that shape the behaviour of individuals as well as the whole society. Second, there is the culture on a smaller level, namely organizational culture (Adler 1997; Bagchi and Cerveny 2003). Third, there is the individual level of culture, as shown by Dorfman and Howell (1988) in their investigation into the effects of national culture on individual behaviour, e.g. technology acceptance, which influences the customer behaviour even in the opposite direction that the society culture is pushing.

2.1 Culture Dimensions

Hofstede's dimensions of culture are often adopted in cultural IS research (McCoy 2003), because they are the most widely cited and used. Given the critiques of Hofstede cultural dimensions, it can be seen as only one way of looking to culture within the IS discipline (McCoy, 2003; Ali and Alshawi 2004a, 2005). The authors argue that studying the potential impact of culture on the CRM systems implementation and operation

requires a deeper analysis of culture, than Hofstede has provided. The authors, in this paper, use concepts of Structurational Theory by Giddens (1979, 1984) to explore the impact of cultural dimensions (as proposed by Ali and Alshawi (2005)) on CRM implementation and operation within a multinational environment. Walsham (2002) stated that Structurational analysis could be used to analyze differences in cultural sub-groups and even individuals.

Ali & Alshawi (2005) proposed many cultural dimensions in their framework for the management of CRM implementation and operation in the multinational environment. A summary of these cultural dimensions and their definitions are shown in Table 1.

Culture Dimension	Definition
Uncertainty avoidance (UA) (Hofstede, 1980, 1983, 1994a; Trompenaars, 1993)	Degree to which people in a country prefer structured over unstructured situations: from relatively flexible to extremely rigid.
Power Distance (PD) (Hofstede, 1980, 1983, 1994a)	Degree of inequality among people, which the population of a country considers as normal: from relatively equal to extremely unequal.
Masculinity/femininity (MF) (Hofstede, 1980, 1983, 1994a)	Degree to which "masculine" values like assertiveness, performance, success and competition prevail over "feminine" values like the quality of life, maintaining warm personal relationships, service, caring, and solidarity: from tender to tough.
Individualism/collectivism (IC) (Hofstede, 1980, 1983,, 1994a)	Degree to which people in a country have learned to act as individuals rather than as members of cohesive groups: from collectivist to individualist.
Confucian Dynamism (Hofstede, 1994b)	Degree to which people in a country promote collective welfare and harmony, resulting in psychological collectivism.
Universalism-Particularism (Trompenaars, 1993)	Degree to which people in a country compare generalist rules about what is right with more situation-specific relationship obligations and unique circumstances
Neutral vs. Emotional Relationship Orientations (Trompenaars, 1993)	Degree to which people in a country compare 'objective' and 'detached' interactions with interactions where emotions is more readily expressed.
Specific vs. Diffuse Orientations (Trompenaars, 1993)	Degree to which people in a country have been involved in a business relationships with in which private and work encounters are demarcated and 'segregated-out'
Achievement vs. Ascription (Trompenaars, 1993)	Degree to which people in a country compare cultural groups which make their judgments of others on actual individual accomplishments (achievement oriented societies) with those where a person is ascribed status on grounds of birth, group membership or similar criteria.
Conservatism vs. Affective/intellectual autonomy (Schwartz, 1994)	Degree to which people in a country emphasis maintenance of status quo (Conservatism), or emphasis creativity or affective autonomy emphasis the desire for pleasure and an exiting life.

Culture Dimension	Definition
Hierarchy vs. Egalitarian (Schwartz, 1994)	Degree to which people in a country believe in freedom and equality and a concern for others (Egalitarian), vs. emphasis the legitimacy of fixed roles and resources (Hierarchy)
Harmony vs. Mastery (Schwartz, 1994)	Degree to which people in a country concerned with overcoming obstacles in the social environment (Mastery) vs. concern beliefs about unity with nature and fitting harmoniously into the environment.
Communal Sharing Relationships (Fiske, 1992)	Degree to which people in a country see the members of a particular group as equivalent and undifferentiated. Group members favour their own group, and can be highly hostile to those outside that group (this concept is so close to Hofstede's notion of Collectivism).
Authority Ranking Relationships (Fiske, 1992)	Degree to which people in a country involve a linear ordering of relations, with people high in rank having not only prestige, privileges and decision-making rights, but also possibly some responsibility for those lower down the hierarchy(this concept has an overlap with Hofstede's notion of power distance).
Equality Matching Relationships (Fiske, 1992)	Degree to which people in a country stress equality in social relations. People here are aware of where imbalances occur and, operating under the norm of reciprocity.
Market Pricing Relationships (Fiske, 1992)	Degree to which people in a country think in terms of prices and investment.

Table 1: A Framework of Culture Dimensions (Ali, &Alshawi 2005)

2.2 Culture, Structuration Theory and IS

The theoretical basis for this paper draws on Structuration Theory by Giddens (1979, 1984). This theory has been highly influential in sociology and the social sciences generally (Walsham, 2002). In addition, it has received considerable attention in the IS field (for a comprehensive review see Jones 1998). The focus for this paper however, will be on how Structuration Theory can offer a new way of looking at cross-cultural research and information systems. A summery of key points as Walsham (2002) proposed it, is provided in Table 2.

Structure	Structure as memory traces in the human mind
	Action draws on rules of behaviour and ability to deploy resources and, in so doing, produces and reproduces structure
	Three dimensions of action/structure: systems of meaning, forms of power relations, sets of norms
	IS embody systems of meaning, provide resources, and encapsulate norms, and are thus deeply involved in the modalities linking action and structure
Culture	Conceptualized as shared symbols, norms, and values in a social collectivity such as a country
	Meaning systems, power relations, behavioural norms not merely in the mind of one

	person, but often display enough to speak of them being shared
	But need to recognize intra-cultural variety
Cross-cultural contradiction and conflict	Conflict is actual struggle between actors and groups
	Contradiction is potential basis for conflict arising from divisions of interest, e.g. divergent forms of life
	Conflicts may occur in cross-cultural working if differences affect actors negatively and they are able to act
Reflexivity and change	Reproduction through processes of reutilization
	But human beings reflexively monitor actions and consequences, creating a basis for social change

Table 2. Structuration Theory, Culture, and ICTs: Some Key Concepts (Giddens, 1979, 1984; Walsham, 2002)

3.   RESEARCH APPROACH

3.1 Research Problem

Following on from the cultural dimension framework proposed by Ali & Alshawi (2005), this study aims to validate the framework through a case study of CRM systems implementation within a large multinational private organization.

3.2 Research Methodology

The case study is one of several ways of doing social science research. A case study has a distinct advantage this is when "a 'how' or 'why' question is being asked about a contemporary set of events over which the investigator has little or no control" (Yin, 1994). In this research the aim is to explore the potential cultural issues that may influence CRM implementation and operation in the multinational organisational environment. Since the study concerns social and cultural phenomena within CRM implementation, therefore a qualitative case study is most appropriate for this kind of research. For more details of culture issues related to CRM systems see Ali & Alshawi (2004a). The authors use an interpretive approach to look at culture phenomena via the lens of the Structurational perspective (Walsham, 2002). For more details about using a Structurational analysis for studying the potential impact of culture on CRM please see Ali & Alshawi (2004b).

The aim for this research is to make sense of the whole, and of the dynamic relationships between the organization, the CRM users, customers and other actors. From an understanding of this, a Structurational analysis can be used as a lens to show where problems reside, how potential solutions can be identified and how wider institutional issues relate to actors and vice-versa. For case studies, five components of a research design are especially important (Yin, 1994):

Research Questions:

The case study strategy as a research method is most likely to be appropriate for "how" and "why" type questions. The research questions here are "How and in what ways might the cultural differences influence the CRM implementation strategies in multinational organizations?"

Research Propositions

Instead of adopting research propositions, the research has identified a research purpose (in line with the interpretive perspective). The research purpose is "to explore the relationships between different cultural levels and how they may influence CRM systems implementation strategy in multinational organisations". For more details of the proposed integrated framework for CRM implementation in multinational environment please see Ali and Alshawi (2004c).

Research Unit of Analysis

The third component is related to the fundamental problem of defining the "case". In this case, the research unit of analysis is the CRM implementation process in a specific country branch.

The logic linking the data to the propositions

Linking data to propositions can be done any number of ways. One promising approach for case studies is the idea of "pattern-matching", described by Donald Campbell (1975), whereby several pieces of information from the same case may be related to some theoretical proposition.

The criteria for interpreting the findings

The authors have used the different finding patterns from each case study to develop an interpretation, derived from the results.

The Case Study Protocol

A case study protocol is more than an instrument. The protocol contains the instrument but also contains the procedures and general rules that should be followed in using the instrument. Having a case study protocol is desirable under all circumstances, but it is essential in multiple-case design (Yin, 1994). Table 3 summarises the case study protocol used in this research.

Case Study Overview	Aim	Investigate the potential impact of national culture on CRM implementation and operation in a multinational organisational environment.
	Objectives	Identify the differences in the implementation and operation process of CRM in the branches of the same multinational organisation in different countries.
		Identify the differences that exist because of differences of the national culture.
		Identify the national culture factors that may influence the CRM systems implementation and operation.
	Issues	Differentiate between different levels of culture (Mintzberg, H. 1979; Dorfman, W. P. and J. P. Howell 1988; Raboy, M. 1997; Hofstede, G. 1980, 1991, 2001; McCoy, S. 2003; Bagchi, K. and R. Cerveny 2003).
		Use a Structurational approach to study cultural aspects, instead of Hofstede's cultural dimensions (Giddens 1979, 1984; Jones, M. R. 1998; Orlikowski, W. 1991, 2000; Walsham, G. 2002).
Field Procedures	Case study sites	Three branches of the same multinational organization but in three different countries, ie. Egypt, UK, and Italy.
	Sources of Information	Observation: staff, work environment, customers, people in each country (Yin, 1994, Orlikowski, 2000).
		Semi-structured interviews: organisation staff, and customers (Yin, 1994, Orlikowski, 2000).
		Documents and CRM systems applications analysis (Yin, 1994, Orlikowski, 2000, Ryals, L., Knox, S., and Maklan, S. 2000; Wilson, H., Daniel E., McDonald M., Ward, J., and Sutherland F. 2001).

Case study questions	Categories of Information	CRM definition, strategies, objectives, technology architecture, components, implementation, operation, problems, integration, touch points, segmentation technique, and customer behavior (Jarvenpaa, S. L., N. Tractinsky, et al. 1999; Ryals, L., Knox, S., and Maklan, S. 2000; Peppard, J. 2000; Wilson, H., Daniel E., McDonald M., Ward, J., and Sutherland F. 2001; Pan, S. L. & Lee, J. N. 2002; Sathish, S., S. L. Pan, et al. 2002; Smith, 2002; Fjermestad, J. and J. Nicholas C. Romano 2003).
		Different staff actions within different departments, norms, conflict, technology awareness, customer focused attitude, communication channels, within the organization in each country (Mintzberg, H. 1979; Skok, W. & Doringer 2001).
		Customer personnel information, needs, behaviours, attitudes, perceptions, expectations, preferences, social class, norms, values, family links, technology awareness, communication channels (Dorfman, W. P. and J. P. Howell 1988; Muthitacharoen, A. and P. C. Palvia 2003; Skok, W. & Doringer 2001 ; McCoy, S. 2003).
	Potential source of Information	CRM managers and staff. Sales managers and sales representatives. Marketing managers and staff. Customer operations and services managers and staff. Customers.
Guide for case study report	Outline	Logical structure.
	Format for the narrative	Clearly communicates major findings and lessons learned.
	Bibliographical	Clear representation of sources for materials, both literature and empirical.

Table3. Case study protocol (Yin, 1994)

4. SSM AND DATA ANALYSIS

'The aim of soft systems methodology' asserts Checkland 'is to take seriously the subjectivity which is the crucial characteristic of human affairs and to treat this subjectivity…..in a way characterized by intellectual rigor.' SSM is variously characterized by Checkland as a 'system of enquiry,' 'enquiry process,' 'learning system,' 'reflection in action,' 'an organized version of doing purposeful thinking,' or 'structured way of thinking' (Checkland and Scholes 1990).

The authors have used SSM to derive the primary themes in each case study (currently Egypt and the UK). The authors take these themes and compare them with the cultural framework (Ali and Alshawi, 2005) to identify the similarities and differences between the two societies, for each cultural dimension. Some cultural dimensions have showed a

significant people behaviour variance while others have not. In addition the data has given rise to a number of new cultural dimensions being proposed. The findings are summarised in table 4.

Culture Dimension	Case Study in Egypt	Case Study in UK
Uncertainty avoidance (UA) (Hofstede, 1980, 1983, 1994a; Trompenaars, 1993)	It was clear that most Egyptians would try to avoid any kind of unstructured situations, and they tend to avoid any risk, but in the same society you would find people who are not like that and are risk takers Example: The problem of paying their bills in the company offices rather than using banks or credit cards, this arises because Egyptians try to avoid unexpected situations or errors in the systems.	It was clear that most British would not be worried about unstructured situations, but they also tend to avoid risk, but in the same society you would find people who are not like that and are risk takers Example: Most British leave their credit cards or debit cards numbers to be debited, most British do trust the system; though, they also believe that if there was a mistake on the system they would be entitled to ask for a claim.
Power Distance (PD) (Hofstede, 1980, 1983, 1994a) Authority Ranking Relationships (Fiske, 1992) Hierarchy vs. Egalitarian (Schwartz, 1994)	Power may affect the way customers try to get their problems solved as they tend to ask for higher management levels as they perceive higher management are more powerful. Egyptian society is sees that there is more power with more senior management; even though the organizational culture would have a different perception of power distance	Power may affect the way customers try to solve their problems as they tend to use different channels and processes according to the importance they give to their complaints. They don't tend to ask for higher management level to solve their problems but they use written complaints by fax or mail to escalate their problems. As the organisational culture has a stronger approach than people tendency, and as the organizational culture is very tightly structured, the result is that customers find it a bit hopeless to get more from higher management, and so use the channel of written complaints instead.
Masculinity/femininity (MF) (Hofstede, 1980, 1983, 1994a)	Egyptians tends to have very warm relationships which create very tight relationships with family and friends which sometimes make them dependent on each other in taking decisions, this might create a phenomena of being in contact all the time	British people are more performance oriented and more independent from family and friends which usually makes them more dependent on themselves for their decisions, and on the other hand that develops a phenomena of undependability
Individualism/collectivism (IC)	The cultural dimension affects the organisational staff more than	

Culture Dimension	Case Study in Egypt	Case Study in UK
(Hofstede, 1980, 1983,, 1994a) Communal Sharing Relationships (Fiske, 1992)	people in the society. From the primary analysis there was no evidence that there are any differences between the Egyptian and the British branches of the organization, as in the Egyptian branch they cover the problem of not being able to work as a team by further training.	
Confucian Dynamism (Hofstede, 1994b)	Egyptians are building on their family welfare and that is the strongest relationship from their perspectives. Inside the work environment, Egyptians tend to have a high turn over, especially in the private sector, as there is a lack of qualified staff. This also increases the cost of training staff.	The British build their own welfare systems and how they relate to their family but the strongest relationship from their perspective is about career. Inside the work environment, the British tend to have a lower turnover for the organization but often people are changing career on an individual basis. That would increase the overall quality of training for the organization staff.
Universalism-Particularism (Trompenaars, 1993)	Egyptians clearly tend towards universalism which causes a lot of misunderstanding in the relationship between the organisation and its customers. Also, Egyptians are more oriented to TV and media than magazines and websites as a source of information, mainly this stems from their educational system.	The British clearly tend towards particularism which causes a very structured and documented relationship between the organisation and its customers. Also, the British are more oriented to magazines and websites than TV and media as a source of information, mainly this results from the education in the society.
Neutral vs. Emotional Relationship Orientations (Trompenaars, 1993) Harmony vs. Mastery (Schwartz, 1994)	This dimension mainly affects customer satisfaction, as Egyptians tend to be more emotional, and give some space for mastery so they are satisfied when they feel happy and cared for, which is more related to the treatment and when they feel that they are in some way special to the organisation.	This dimension mainly affects customer satisfaction, as the British tend to be more neutral, and try always to be in harmony so they feel satisfied when they get what they looking for, which is mainly 'value for money'.
Specific vs. Diffuse Orientations (Trompenaars, 1993)	Egypt is in the transition from public sector based economy to more private organisations, which affects Egyptian perception and expectation concerning quality or service.	The British live in a private based economy and so see it more crucial to look for the quality of service and seek 'value for money'.
Achievement vs. Ascription (Trompenaars, 1993)	Egyptians tends to try to get to a higher social level as the traditions and norms give people more respect according to which social class they are from or	British also show social class differences but as the society is more focused on individuals, then people don't give as much

Culture Dimension	Case Study in Egypt	Case Study in UK
Conservatism vs. Affective/intellectual autonomy (Schwartz, 1994) Equality Matching Relationships (Fiske, 1992)	have reached.	attention to social classes.
Market Pricing Relationships (Fiske, 1992)	Both Egyptian and British showed their interest in keeping an eye on prices and it seems that it is the most important thing in a product or services. But, that would differ from each segment of each society.	
Professionalism	As a developing country, Egyptians as individuals are very professional but the entire work environment has been influenced by the defaults of the old public sector based economy. For example, time and level of quality, and quantity to quality relationship.	The work environment is very professional as the system depends on values and respect for time, quality not quantity, and higher qualified skilled employees.
Trust	The involvement of public sector based economy and then the transition phase of Egyptian society has create a 'scariness' of people in the society about getting their rights, so people do as much as they can to have their own rights.	British do or sometimes do not trust the work environment, but what is important and certain for them is that they would get their rights back sooner or later. Some even feel they would be lucky if there is a mistake in the system and as a result they get some reward (compensation).
Technology Awareness	At the individual level Egyptian employees are very technology literate especially young Egyptians; but in the whole society most of the people are still not aware of using the web, email, computers, and ATMs, especially older people.	In general most British people are very technology literate especially young people, but in some cases there are still some barriers to the level of technology they are aware of and willing to use; most of the people use web, email, computers, and ATMs.
Structured or organized vs. unstructured or unorganized behaviour	Egyptians tend to have an unstructured approach in their life, they like to change all the time even when it is coming to rules and procedures in work environments.	British are very structured and tend to have difficulty with changes to the rules and procedures, even if it is outside the work environment.
Openness to Others' cultures	Egyptian show a very open attitude to accept other cultures and other values and norms.	The British show a closed perception about other cultures; this may come from the advanced work environment of the UK which gives advantages to the UK over other countries.

Culture Dimension	Case Study in Egypt	Case Study in UK
		Therefore the British tend to believe that others would adapt to them, rather than the other way around.

Table 4: An Updated Framework of Culture Dimensions (after Ali & Alshawi 2005)

5.   SUMMARY AND FUTURE RESEARCH

Cultural factors are often identified as having a crucial influence on the success or failure of Information Systems in general and Electronic Customer Relationship Management Systems (CRM) in particular. The authors identified different cultural levels and different cultural dimensions. The authors argue that Hofstede's cultural dimensions, which is the most cited study used in IS discipline, is not appropriate for studying the potential cultural impact on CRM implementation. The authors propose Structuration Theory as another perspective to help with the study of cultural issues in the IS discipline. The primary Structurational analysis of the comparative case study shows that, there are some cultural dimensions which play a role in each society and in CRM implementation/operation in a multinational environment. Some of these cultural dimensions have been defined in the previous literature but this paper proposes number which add to that body of knowledge (ie. previous cultural dimensions do not show any influence on the behaviour of people from country to country). The authors also show in their analysis which level of culture each dimension displays a significant influence. The authors have used qualitative research data analysis, mainly derived from SSM to code their data, and develop the different themes of each case study. This led to a primary validation of the cultural dimensions proposed in the Ali & Alshawi (2005) framework that identified cultural dimensions which may have an influence on the CRM implementation and operation in multinational environments.

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