International Journal of Research in Marketing 43 (2026) 8–27

Contents lists available at ScienceDirect

International Journal of Research in Marketing

journal homepage: www.elsevier.com/locate/ijresmar

2023 EMAC Distinguished Marketing Scholar Award paper

Customer Relationship Management: Past, Present, and Future

Werner J. Reinartz

University of Cologne, Department of Retailing and Customer Management, Albertus-Magnus-Platz 1, 50923 Cologne, Germany

A R T I C L E I N F O

Article history: First received on 29 July 2025 and was under review for 2½ months.
Area Editor: Peter C. Vehoef
Accepting Editor: Stefan Wuyts

Keywords:
CRM
customer relationship management
marketing strategy
review
topic modeling
research agenda

A B S T R A C T

Customer Relationship Management (CRM) has evolved from a tactical marketing tool into a strategic cornerstone for creating sustainable competitive advantage. This paper offers a comprehensive review of CRM's past, present, and future, highlighting its transformation from satisfaction-driven models to engagement-oriented strategies. Leveraging a corpus of 1,025 CRM-related articles published between 1995 and 2023, we employ Latent Dirichlet Allocation (LDA) to identify six key research streams—experience, organization, satisfaction, loyalty, profitability, and community—and trace shifts in scholarly attention across these domains. Findings reveal a growing emphasis on designing compelling customer experiences and fostering brand communities, reflecting the rising strategic importance of emotional and social connections. The paper concludes by outlining critical research gaps, including the implications of digital transformation, evolving customer access, and the strategic potential of brand communities. These insights provide a roadmap for future CRM scholarship and practice in an increasingly data-driven and customer-centric marketplace.

1. Introduction

Creating and capturing value beyond the core product has become increasingly critical for firm survival and growth. The building of systematic and lasting relationships with customers has been a dominant thought in this respect. Yet, understanding how to systematically build and leverage customer relationships to create such value remains a fundamental challenge in marketing research. The origin of customer relationship management (CRM) traces back to the idea that customers value not just the core product but the entire customer experience (Levitt, 1969), integrating emotional, cognitive, and relational elements beyond the mere transaction (Holbrook & Hirschman, 1982; B. Schmitt, 1999). Building on this idea, Berry (1983) argued in his seminal paper that firms must look beyond customer acquisition to focus on retaining and enhancing customer relationships. Theoretical advances and extensive experimentation in this area, combined with the emergence of customer data, personal computers, and database and direct marketing (e.g., Bult & Wansbeek, 1995; Gönül & Shi, 1998), catalyzed the adoption and optimization of CRM practices and the rise of CRM system vendors such as Salesforce Inc.

Since then, the growing importance of CRM (both strategically as well as operationally) has created new challenges and research questions that demand systematic investigation. Three market developments illustrate this evolution (see Fig. 1). First, the CRM software market has become the largest enterprise software segment since 2018, with market size projections reaching $89 billion in 2024 and $145.6 billion by 2029 (Statista Market Insights, 2025). This growth reflects how the continuous collection of customer behavior data and advancing analytical capabilities fundamentally change how firms understand and manage customer relationships. Second, the value of intangible assets as a percentage of capital expenditures has grown drastically, from under 10 % in the 1960s to

E-mail address: werner.reinartz@uni-koeln.de.

https://doi.org/10.1016/j.ijresmar.2025.12.001

Available online 3 December 2025

almost 60 % in 2022, highlighting how the value of customer relationships and other intangible assets such as brand equity and intellectual property have become central to firm value creation. Third, the declining longevity of S&P 500 firms—from 32.2 years in 1965 to 21.4 years in 2020, with projections of 16.4 years by 2029 (Viguerie et al., 2021)—underscores the mounting pressure on firms to build sustainable competitive advantages through customer relationships rather than product differentiation alone. These substantive shifts raise important questions about how academic research has kept pace with and informed these developments. As CRM has evolved from a tactical marketing tool to a strategic imperative, understanding this evolution becomes essential to identify potential practice-research gaps, revealing how theoretical foundations have adapted to changing market realities, and providing guidance for future research.

Given CRM's growing importance and complexity, we also need a clearer picture with respect to the academic side of things. In other words, *how has CRM research evolved and what does this evolution reveal about changing scholarly attention and remaining knowledge gaps*. This paper addresses this gap by decomposing three decades of CRM research to understand how scholarly attention has evolved and what this evolution reveals about the field's theoretical foundations. Using Latent Dirichlet Allocation (LDA) topic modeling of 1,025 CRM-related articles published in leading marketing journals between 1995–2023, six interconnected CRM research streams emerge, which I contextualize and trace to understand how scholarly attention to each has evolved over time. The systematic topic modeling combined with expert interpretation reveals six core challenges that have dominated CRM research heretofore: (1) 'How to design compelling customer experiences that help firms differentiate?', (2) 'How to organize firms to deliver these experiences?', (3) 'How to achieve customer satisfaction?', (4) 'How to build loyalty?', (5) 'How to identify profitable customer relationships?', and (6) 'How to enhance relationships through communities that create belonging?'. At their core, these questions reflect the foundational idea that firms must look beyond the core product to manage the entire customer experience (Levitt, 1969) and systematically attract, retain, and enhance customer relationships (Berry, 1983). The analysis reveals that scholarly attention has shifted from customer satisfaction and profitability towards experience design and relationship enhancement, while research on organizational capabilities and customer loyalty has remained consistently relevant over the past decades.

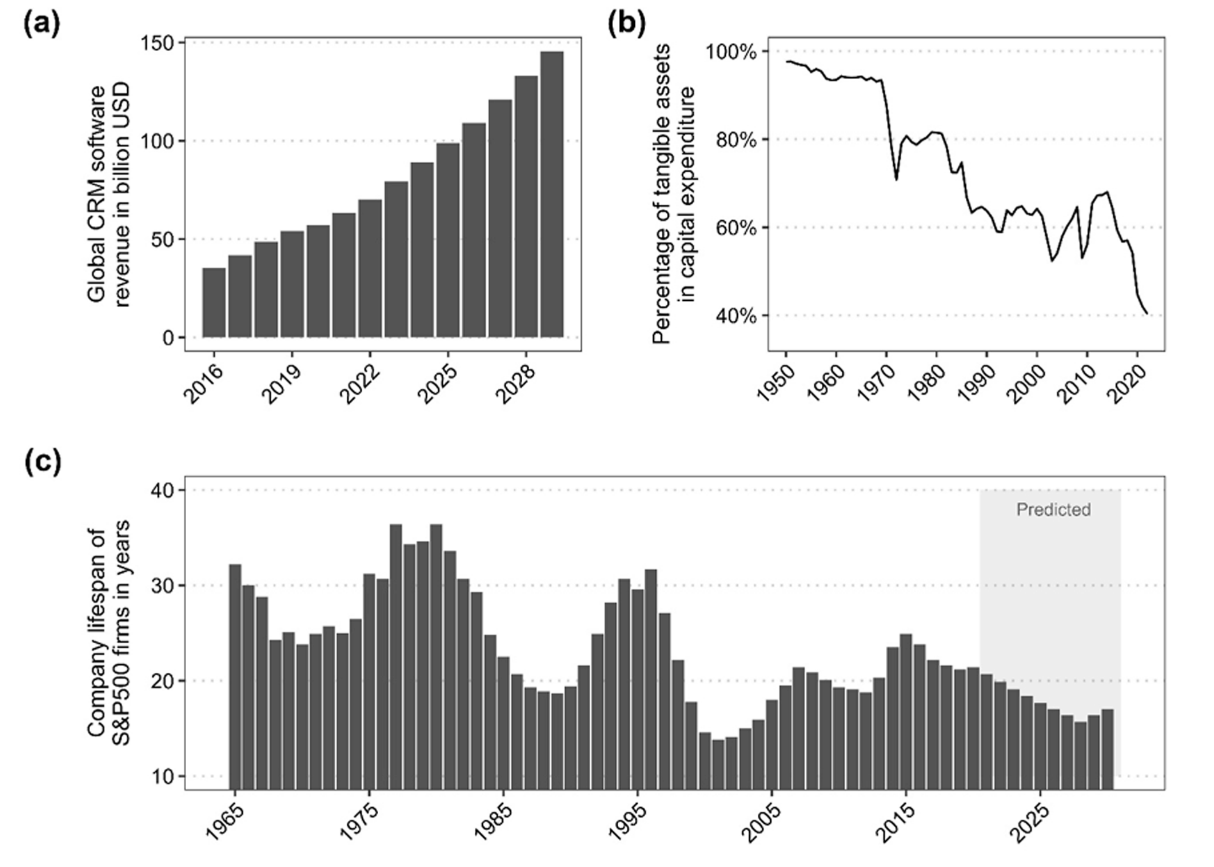


Fig. 1. Three general trends in business markets that relate to CRM. *Notes:* **(a)** Expenditure for CRM software market in billion USD (Statista, 2021), **(b)** share of tangible assets in capital expenditure of non-financial businesses in the US, calculated as $\left(1 - \frac{Advertising\ Exp. + R\&D\ Exp.}{CAPEX}\right)$, sample size n > 19,000 **(c)** rolling 7-year average of company lifespan on S&P 500 firms based on Viguerie et al. (2021).

In the following, I will first examine the evolution of CRM publications overall and describe the methodology for decomposing the CRM research streams. Then, I will present a detailed analysis of how scholarly attention to each research stream has evolved, highlighting key contributions and contributors and shifts in scholarly focus within each stream. Next, from the review of past CRM research, I will derive and highlight three underexplored areas requiring future research attention and their potential implications for research and practice.

2. Evolution of CRM research and decomposition of its research streams

Research on CRM emerged from the literature on customer satisfaction and relationship building in the late 1990 s (Kumar & Reinartz, 2018b). CRM research distinctly acknowledges that relationship building should focus only on profitable customers, requiring an understanding of the customer's value over their lifetime. This customer lifetime value perspective—defined as "the economic value of the customer relationship to the firm" (Kumar & Reinartz, 2018b, p. 5)—marks the starting point of modern CRM. Taking 1995 as a rough starting point, I review how the CRM literature evolved over the past three decades, from functional applications to today's strategic and social approaches.

Leveraging the Web of Science database, I searched for CRM-related articles published in leading marketing journals between 1995 and 2023. Table 1 provides an overview of the journals included. Journal selection followed a systematic process. I identified top-tier marketing journals using established rankings (ABS, VHB) where CRM research forms a core part of the publication portfolio. The 13 journals selected represent *the mainstream of CRM scholarship* while maintaining focus—they consistently publish CRM research and are widely recognized in the field. This targeted approach avoids dilution from tangential topics while capturing the essential body of CRM knowledge.

To ensure a relation to CRM, I filtered for articles whose title, abstract, author keywords, or Clarivate's Keywords Plus match with pre-specified CRM-related terms, namely "*customer relationship management*", "*crm*", "*customer relationships*", "*customer experience*", "*customer engagement*", "*customer retention*", "*customer loyalty*", "*crm implementation*", "*crm strategies*", "*crm technologies*", "*crm system*", "*crm integration*", "*crm adoption*". The chosen terms represent the core of the CRM domain sufficiently broad, yet precise and delimited. For example, I do not include the term "customer satisfaction" in the search query, as the satisfaction literature has long-standing roots from which CRM research later emerged. Consequently, I interpret all papers and trends relevant to customer satisfaction within the broader CRM context. This approach also applies to any related academic domains—such as loyalty—that predate CRM research. The search resulted in a corpus of 1,025 CRM articles.

Table 1 provides an overview of the journals included in the Web of Science database search, their 5-year impact factor, the number of CRM-related publications, and citations.

CRM has garnered growing attention in academic marketing research, as evidenced by both the growing number of publications each year and the increasing relative share of CRM-related publications compared to all other publications in the selected marketing journals. As shown by Fig. 2, the longitudinal development of both, absolute and relative share of publications exhibit two positive signals.

First, CRM emerged and stabilized between 1995 and 2018. Growth in the number of publications and in the relative share was particularly pronounced in the first half of this period. During this time, CRM established itself as a new academic research topic, with novel scientific contributions laying the foundation for further studies and research streams in this area (e.g., Bolton, 1998; Garbarino & Johnson, 1999; Srivastava et al., 1998). The number of CRM-related publications increased to approximately 50 annually, and their share relative to all publications in the leading marketing journals rose to around 6 %. This was followed by a stabilization in absolute and relative terms, averaging around 30 papers per year and accounting for roughly 4 % yearly. The second positive signal marks the end of the stabilization phase in 2019, as growth starts to pick up again. By 2021, the number of publications had reached approximately 80 articles, and their relative share likewise increased slightly to around 5 %.

Table 1
Overview of included marketing journals and publications in the corpus.

Journal	5-year IF in 2023	CRM-related	
		Publication count	Clarivate Citations
Journal of Marketing	15.0	94	37,910
Journal of Marketing Research	7.4	49	7872
Journal of Consumer Research	8.6	5	184
Marketing Science	5.4	53	7114
Management Science	6.1	48	3121
Journal of the Academy of Marketing Science	14.6	105	19,623
Journal of Retailing	9.1	70	12,669
International Journal of Research in Marketing	7.0	51	3310
Journal of Service Research	13.4	103	18,131
Marketing Letters	3.7	29	935
Journal of Interactive Marketing	10.0	53	7337
Journal of Business Research	11.2	338	27,594
Journal of International Marketing	7.1	27	887

Notes: Publications from 1995 to 2023. Citations accumulated over 1995–2023 as measured mid of the year 2024. 5-year IF refers to the journal impact factor based on the Clarivate Journal Citation Report 2023. Clarivate citations refer to the articles in the corpus.

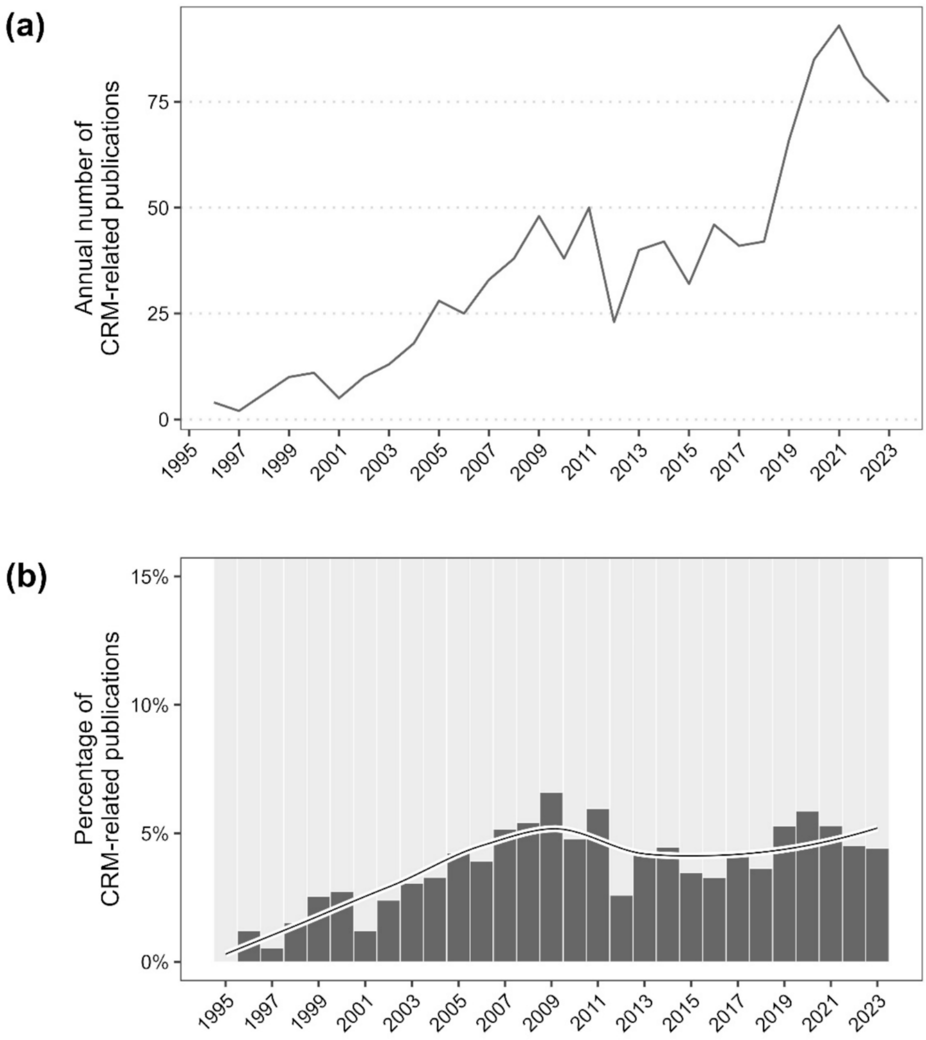


Fig. 2. Longitudinal development of CRM-related publications. *Notes:* **(a)** Annual number of CRM-related publications in absolute and **(b)** percentage share of CRM-related publications relative to all publications in the leading marketing journals.

To uncover the latent structure within the academic CRM domain, I employ automated topic modeling on the abstracts of the corpus of 1,025 CRM-related articles. This data-driven approach uses LDA to identify patterns in how CRM scholars discuss their research—revealing six themes based on word co-occurrence patterns rather than predetermined categories. I then interpret these algorithmic findings through expert synthesis, connecting the statistical patterns to conceptual developments in the field. This mixed-methods approach combines objective pattern detection with domain knowledge to map CRM's evolution.

LDA is a generative probabilistic topic modeling technique for analyzing large unstructured text data (Blei et al., 2003). This technique is well established in academic marketing (e.g., Borah et al., 2023; Li & Ma, 2020; Tirunillai & Tellis, 2014). Applying LDA involves two preliminary steps. First, the abstracts of the 1,025 articles are pre-processed, including creating bigrams, removing stop words, and applying lemmatization. Second, LDA requires pre-specifying the number of topics for the topic modeling process. The optimal number of topics relies on maximizing the perplexity score as a fit criterion, indicating the quality of the topic model, and minimizing the thematic overlap among the topics. Pre-specifying six topics yielded the optimal balance between high fit and low thematic overlap. As is common with LDA, some slight thematic overlap remains (Borah et al., 2023).

3. Scholarly attention in CRM research

3.1. General trends in scholarly attention

The topic modeling of the CRM literature reveals six interconnected research streams that collectively address the fundamental challenges and themes of CRM. These streams emerged from systematic analysis combining LDA topic modeling with expert interpretation. The algorithm identified distinct clusters of co-occurring terms in article abstracts. I then mapped these statistical patterns to conceptual themes, validated them against the literature, and traced their development over time. Each stream represents a coherent research conversation—papers within a stream cite each other, share methods and constructs, and collectively advance understanding of a specific CRM challenge. The six research streams are not isolated domains but rather *complementary* perspectives that reflect the multifaceted nature of how firms create value through customer relationships. Building on the premise that firms must look beyond the core product to manage the entire customer experience (Levitt, 1969) and systematically acquire, retain, and enhance relationships (Berry, 1983), each stream addresses a critical aspect of the CRM challenge.

At the core of CRM lie two interrelated dimensions focused on customer experience delivery. The *experience* stream examines how firms design compelling customer interactions across touchpoints to differentiate themselves in increasingly commoditized markets. However, this experiential dimension cannot exist in isolation as it depends on appropriate organizational structures. The *organization* stream thus investigates the capabilities, processes, and cultural elements firms need to deliver these superior experiences consistently. Together, these two streams represent the "how" of CRM—one represents the customer-facing design while the other enables its implementation.

These experience-focused streams connect directly to the well-established satisfaction-loyalty-profit chain that has historically driven CRM research and practice (Kumar & Reinartz, 2018a). The *satisfaction* stream provides the foundational metrics and understanding of how customers evaluate their interactions with a firm, forming the basis for relationship quality. When these experiences consistently meet or exceed expectations, they foster *loyalty*—both behavioral (repeat purchases) and attitudinal (emotional commitment). This loyalty, when strategically cultivated, ultimately drives the *profitability* dimension, which focuses on identifying and nurturing customer relationships that generate sustainable economic value through the customer lifecycle.

Guided by insights from the *loyalty* and *profitability* stream, brand managers and marketing scholars increasingly recognize the crucial role of attitudinal loyalty in attracting and retaining profitable customers. With the *community* stream, CRM research examines how brands can enhance traditional loyalty by fostering customer-to-customer connections and shared brand experiences that create a sense of belonging. This newest stream represents a significant evolution from transactional loyalty programs to emotionally-driven engagement platforms, reinforcing the entire CRM value chain.

Together, these six research streams form an integrated framework for understanding how CRM research has evolved from operational tactics focused on satisfaction measurement to strategic imperatives encompassing experience design, organizational transformation, and building communities. Table 2 provides an overview of these six research streams within the broader CRM research context, highlighting their definitions and evolutions.

Over time, scholarly attention to the six CRM research streams has shifted significantly, as shown in Table 3 and Fig. 3. This shift highlights the transition of CRM research from an operational focus to one centered on creating differentiated experiences and fostering emotional connections. Three key trends illustrate this evolution. First, traditional CRM metrics have declined in prominence.

Table 2
Overview of CRM research streams.

CRM- Stream	Description of stream in the CRM context	Key Advancements
Experience	The strategic design and management of customer interactions across all touchpoints to create differentiated value beyond the core product offering.	• Recognition of multidimensional and contextual nature of experiences • Integration of digital technologies for enhanced customer experiences
Organization	The development of firm capabilities, structures, and processes required for consistently delivering superior customer experiences and relationship management.	• Genuine organizational implementation of CRM as success factor • Cross-functional integration of and coordination between CRM themes within firms
Satisfaction	Measuring and systematically improving customers' cognitive and emotional evaluations of their interactions, forming the foundation of relationship quality.	• Shift from passive measurement to active co-creation • Integration of digital and physical experiences
Loyalty	The cultivation of customer commitment that extends beyond repeat purchases to emotional attachment and advocacy.	• Shift from behavioral to holistic loyalty, incorporating attitudinal loyalty • Multichannel integration and personalization
Profitability	The identification, acquisition, and nurturing of customer relationships that generate sustainable economic value throughout the customer lifecycle.	• Evolution to strategic value-based customer management • Consideration of non-economic customer value drivers
Community	The cultivation of multi-dimensional networks where customers connect with the brand, the firm, products, and each other, creating belonging beyond individual relationships.	• Transition toward relational, community-based engagement • Integration of interactive and digital strategies for community engagement

Table 3
Summary statistics of CRM research streams from 1995 to 2023.

CRM Stream	Publications	Per Publication Mean Age (Years)	Citations/Years
1: Experience	214	5.9	29.3
2: Organization	152	10.6	12.3
3: Satisfaction	255	11.0	17.5
4: Loyalty	116	8.8	8.7
5: Profitability	173	12.2	8.0
6: Community	115	4.9	26.8

Notes: Publications are cumulative. Per Publication Mean Age (Years) denotes the sum of all articles' ages divided by the number of articles published in the respective stream. Citations/Years divides the sum of the articles' citations in a stream by the sum of their age in years.

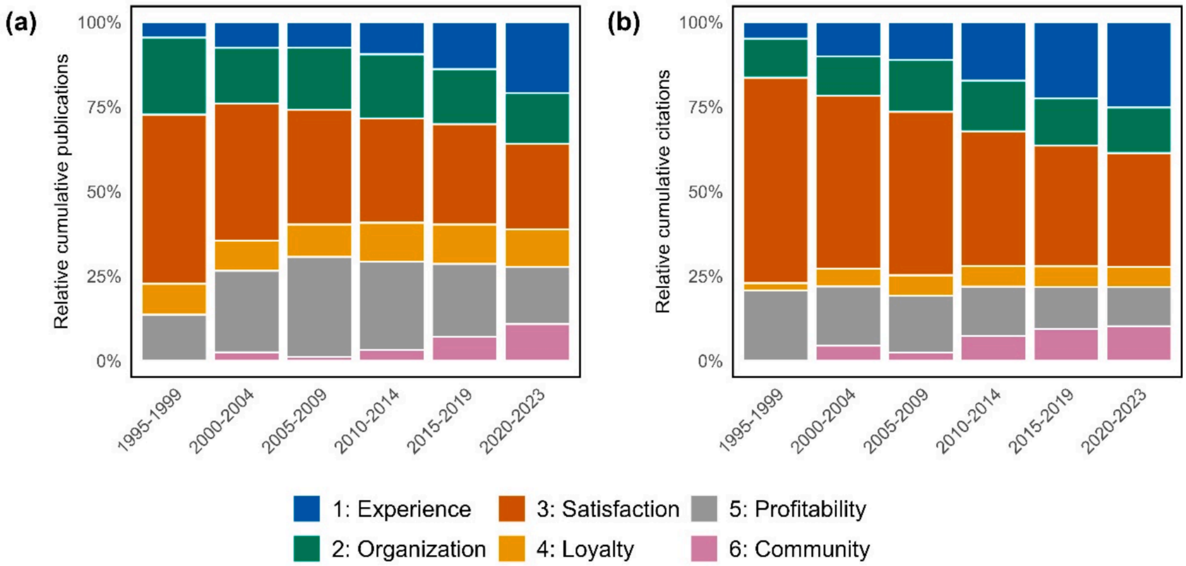


Fig. 3. Relative attention to the six CRM research streams. *Notes:* **(a)** Relative attention in terms of cumulative publications. In 2005-2009, the CRM-profitability stream made up around 30% of all CRM-related publications. **(b)** Relative attention in terms of cumulative citations. In 2020-2023, the CRM-community stream made up around 10% of all CRM-related citations.

Customer satisfaction (255 articles) and profitability (173 articles) remain the most established research streams, with average publication ages of eleven and over twelve years, respectively. However, their impact differs. Satisfaction research within CRM remains influential, with an average paper receiving 17.5 citations per year, though it has shifted from top-tier journals to broader outlets. While consistently present in top-tier journals, profitability research has a lower impact, with 8 citations per year. Second, organizational and loyalty research serve as bridges between operational and experiential perspectives. Studies on organizational capabilities generate moderate impact, with papers receiving an average of 12.3 citations annually across various publication venues. Loyalty research, though consistently present, has a more limited influence, with an average of 8.7 citations per year. These streams remain relevant by linking traditional CRM metrics with emerging experiential approaches. Third, experiential dimensions have become the new posterchild of CRM scholarship, attracting the highest levels of attention and impact. Research on customer experience design, despite being relatively young at six years on average, has the highest citation rate, with an average paper receiving 29.3 citations per year. Community research, the newest stream at under five years, is also highly influential, with an average of 26.8 citations per year. Its rapid rise highlights the increasing recognition of customer communities as a source of brand advocacy, co-creation, and long-term loyalty. Together, these two streams signal a shift in CRM research toward engagement-driven models prioritizing emotional bonds and compelling experiences over operational efficiency.

3.2. CRM scholars form a vibrant community

The evolution of CRM research is shaped by the collective contributions of a diverse and vibrant scholarly community. Since the field's early days around 1995, some scholars have made lasting contributions (see Table 4). These scholars offer valuable entry points for exploring CRM research, yet the field remains open to new voices. Measuring scholarly impact is inherently complex, as different

Table 4
Scholars with top contributions to CRM research from 1995 to 2023.

Author	# of top 5 Pubs.	Pubs.	Cits.	EXP	ORG	SAT	LOY	PRFT	COM	HHI
Kumar, V.	19	44	10,154	1	5	1	0	11	1	0.4
Netzer, O	7	7	546	1	0	0	0	5	1	0.6
Schweidel, DA	7	7	364	1	0	0	0	6	0	0.8
Sudhir, K	6	6	358	0	2	0	1	3	0	0.4
Verhoef, PC	5	25	8,925	1	2	0	0	2	0	0.4
Lemon, KN	5	13	7,131	1	1	1	0	2	0	0.3
Reinartz, WJ	5	9	4,047	1	1	0	0	3	0	0.4
Venkatesan, R	5	13	2,712	0	1	0	1	3	0	0.4
Neslin, SA	5	14	2,350	2	0	0	1	2	0	0.4
Palmatier, RW	5	11	2,315	1	1	2	0	0	1	0.3
Lewis, M	5	7	768	0	0	0	1	4	0	0.7
Ascarza, E	5	5	191	0	0	0	0	5	0	1.0
Bolton, RN	4	8	3,100	0	0	1	0	3	0	0.6
Homburg, C	4	9	2,018	0	1	1	0	1	1	0.2
Thomas, JS	4	9	1,959	0	1	0	0	3	0	0.6
Wieseke, J	4	7	1,104	0	1	2	0	0	1	0.4
Bradlow, ET	4	4	297	0	0	0	0	4	0	1.0
Fader, PS	3	7	473	0	0	0	0	3	0	1.0
Alavi, S	3	6	404	0	2	0	0	0	1	0.6
Grewal, R	3	4	348	0	2	1	0	0	0	0.6

Notes: Publications from 1995 to 2023. Clarivate citations accumulated over 1995–2023 as measured mid of the year 2024. Pubs. = publications, Cits. = citations, EXP = experience, ORG = organization, SAT = satisfaction, LOY = loyalty, PRFT = profitability, COM = community, HHI = $\sum_{i=1}^{N}\left(\frac{x_i}{\sum_{j=1}^{N}x_j}\right)^2$ where x_i denotes the number of top 5 publications (JM, MS, JCR, JMR, MgmtS) in topic i.

approaches capture different dimensions of impact. Here, a pragmatic approach is used to rank authors in descending order based on the number of their top-5 publications (*Journal of Marketing*, *Journal of Marketing Research*, *Marketing Science*, *Management Science*, and *Journal of Consumer Research*) between 1995 and 2023. These five journals are widely and commonly accepted in the field for their top stature. Also, the goal is not to present an author ranking as such. It is rather, to present the set of authors who propelled the topic of CRM into our top journals and hence into the *discipline's front stage*. Moreover, CRM research thrives through the collective efforts of scholars at all career stages.

The CRM research community is distinguished by its intellectual diversity, bringing together scholars with varied methodological backgrounds and substantive interests. Some researchers have focused deeply on specific CRM subfields, while others have explored multiple CRM-related topics. To illustrate this diversity, I computed the Herfindahl-Hirschman index for each scholar across six CRM research streams, where higher scores indicate specialization and lower scores reflect broader interests. For instance, scholars such as V. Kumar, Peter Verhoef, Katherine Lemon, and Christian Homburg have made wide-ranging contributions across multiple CRM domains, whereas colleagues such as David Schweidel, Eva Ascarza, and Eric Bradlow are recognized for their specialized and methodological expertise. Many others drive the field forward in unique ways. This diversity of perspectives and approaches fuels CRM research, making it an open and evolving space for all who seek to contribute.

4. The six streams of CRM research

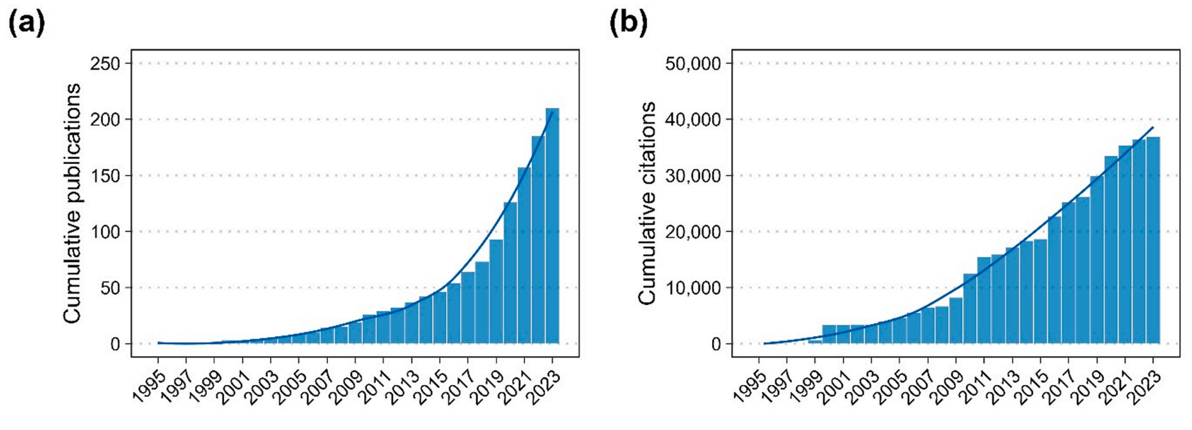
4.1. CRM research on experience

Research on customer experience design has become a key area within CRM, helping firms differentiate in competitive and commoditized markets. As the second-largest research stream, comprising 214 publications (20.9 % of 1,025), it is also the second most influential by citations (see Fig. 3). This field has grown rapidly, with articles averaging 29.3 citations per year and a typical publication dating back six years. Fig. 4 illustrates these trends and highlights key contributions that outline the field.[1]

Customer experience research builds on Levitt's (1969) recognition that customers value the buying experience beyond the core product and Berry's (1983) emphasis on relationship management (Boulding et al., 2005). Scholars later identified customer engagement as a key driver of superior experiences, defining it as both a psychological state from interactive experiences (Brodie et al., 2011) and as behavioral expressions beyond purchase, such as word-of-mouth, recommendations, and co-creation (Van Doorn et al., 2010). In line with service-dominant (S-D) logic, engagement behaviors—such as contributing knowledge, skills, and time—enhance firm offerings and co-create value (Hollebeek et al., 2019; Jaakkola & Alexander, 2014). Firms can actively foster engagement through marketing initiatives that provide extrinsic rewards or create memorable shared experiences (Harmeling et al., 2017).

A major advancement in customer experience research was recognizing its multidimensional nature, encompassing cognitive,

[1] I carefully selected exemplary papers that best illustrate the nature of the research stream and make a notable contribution to its advancement.



(c)

Authors	Year	Title	Citations per year
Puntoni et al.	2021	Consumers and Artificial Intelligence: An Experiential Perspective	117
Hollebeek et al.	2019	S-D Logic-Informed Customer Engagement: Integrative Framework, Revised Fundamental Propositions, and Application to CRM	120
Lemon and Verhoef	2016	Understanding Customer Experience Throughout the Customer Journey	316
Brodie et al.	2011	Customer Engagement: Conceptual Domain, Fundamental Propositions, and Implications for Research	181
van Doorn et al.	2010	Customer Engagement Behavior: Theoretical Foundations and Research Directions	166

Fig. 4. Developments in CRM research on experience. *Notes:* **(a)** Accumulated publications per year, **(b)** accumulated citations per year, and **(c)** exemplary papers illustrating the nature of the CRM experience research stream.

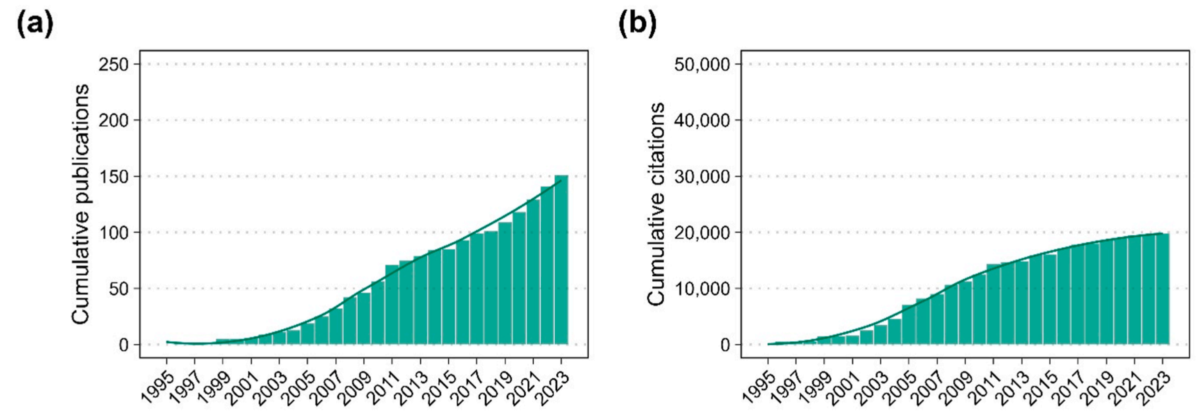
emotional, behavioral, sensorial, and social responses across various touchpoints—brand-owned, partner-owned, customer-owned, or external (Lemon & Verhoef, 2016). This perspective shaped customer experience management, linking organizational resources such as cultural mindsets, strategic directions, and capabilities to the design of superior experiences (Homburg et al., 2017). The TCQ framework further suggests firms should consider how touchpoints (T) embed in broader contexts (C) to exhibit specific qualities (Q); for instance, fewer human touchpoints in social settings may affect customer involvement with the firm (De Keyser et al., 2020). Effective customer experience design requires balancing the delivery of compelling experiences to customers and capturing value through lasting relationships (Kumar & Reinartz, 2016).

Digital transformation has redefined customer experience design, shifting interactions from controlled, one-way exchanges to dynamic, multidirectional flows (Hennig-Thurau et al., 2023). This shift enables firms to create differentiated experiences using technologies such as the Internet of Things (IoT), Augmented or Virtual Reality (AR/VR), and artificial intelligence (AI) (Hoyer et al., 2020). These technologies enhance product trials, enable personalized interactions, and enrich consumption experiences, embedding customer experience design within digital ecosystems. However, their effectiveness depends on firms' ability to balance immersive engagement with risks such as privacy concerns and to integrate these technologies seamlessly into broader customer experience strategies (Kumar et al., 2019; Puntoni et al., 2021).

4.2. CRM research on organization

While customer experience design has become a key area within CRM, research on organizational capabilities needed to deliver these experiences consistently has emerged as a distinct research stream. Research on organizing to deliver superior customer experiences totals 152 publications (14.8 % of 1,025) with steady citation levels averaging 12.3 citations per year. As the second oldest research stream, typical publications date back almost eleven years. Fig. 5 displays the development of this evergreen field and some key articles.

The key insight driving this research area is that superior customer experiences require treating CRM as a strategic imperative, rather than just a technological initiative. Early CRM implementations often failed when firms adopted technology without corresponding organizational changes—technology alone does not guarantee success (Reinartz et al., 2004; Verhoef, 2003). Similarly, firms that imitated competitors' CRM initiatives without genuine organizational transformation saw reduced effectiveness, highlighting that superficial adoption is insufficient (Hillebrand et al., 2011). Successful CRM implementation depends on organizational factors such as top management support, corporate-level ownership, and employee engagement (Bohling et al., 2006; Kumar & Pansari, 2016). Customer-centric values and management systems bridge organizational culture and CRM effectiveness, ensuring strategic goals translate into operational practices (Jayachandran et al., 2005).



(c)

Authors	Year	Title	Citations per year
Kumar and Pansari	2016	Competitive Advantage Through Engagement	90
Kumar et al.	2011	Is Market Orientation a Source of Sustainable Competitive Advantage or Simply the Cost of Competing?	38
Payne and Frow	2005	A Strategic Framework for Customer Relationship Management	56
Jayachandran et al.	2005	The Role of Relational Information Processes and Technology Use in Customer Relationship Management	33
Reinartz et al.	2004	The Customer Relationship Management Process: Its Measurement and Impact on Performance	49

Fig. 5. Developments in CRM research on organization. *Notes:* **(a)** Accumulated publications per year, **(b)** accumulated citations per year, and **(c)** exemplary papers illustrating the nature of the CRM organization research stream.

As customer journeys expanded across multiple channels, research on CRM structures shifted from departmental coordination to cross-functional integration challenges (Payne & Frow, 2005). Many firms struggled to break down silos, leaving CRM teams disconnected from core business units and limiting strategic impact (Reimann et al., 2010). Research evolved from optimizing isolated touchpoints to orchestrating seamless customer journeys, examining how firms can align functions around interactions rather than internal goals (Homburg & Tischer, 2023; Ramani & Kumar, 2008). This shift underscores both the benefits of integrated experiences and the complexities of increased coordination.

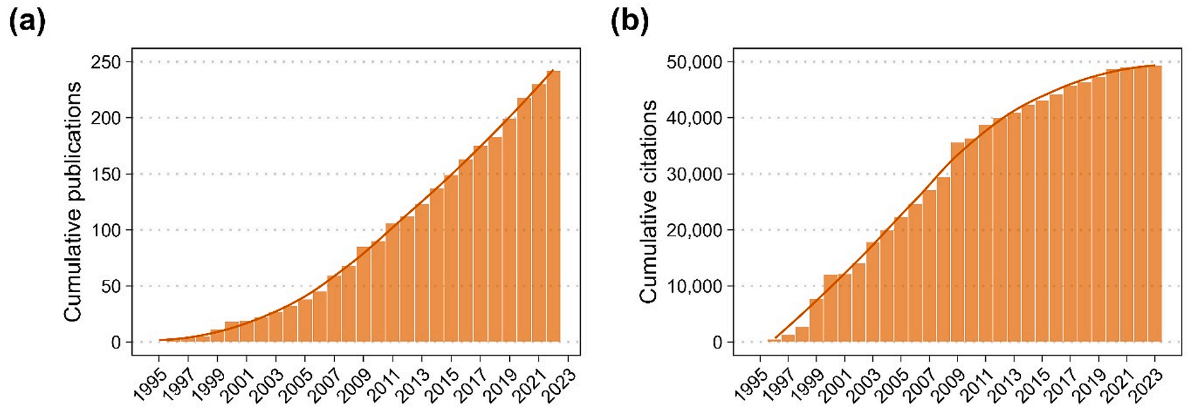
Technological advances continue to reshape CRM, driving automation and personalization across marketing, sales, and service functions while requiring continuous organizational adaptation (Rust & Huang, 2014). Service robots, for example, offer efficiency gains but create trade-offs in service quality (Xiao & Kumar, 2021). Organizational factors remain critical—when technology disrupts roles, employee resistance can hinder adoption, necessitating careful change management (e.g., Hunter & Perreault, 2007; Speier & Venkatesh, 2002). As firms adopt technology to enhance market orientation, sustaining competitive advantage becomes harder. Once a differentiator, market orientation is now a cost of competing (Kumar et al., 2011), reinforcing the need for continuous CRM evolution. The rise of social media, for instance, has driven firms to develop social CRM strategies that integrate customer engagement with broader business goals (Li et al., 2021).

4.3. *CRM research on satisfaction*

While experience design and respective organizational capabilities are vital for CRM success, customer satisfaction research provided the foundation upon which modern CRM was built. As the largest research stream, it comprises 255 articles (24.9 % of 1,025) and is also the most cited (see Fig. 3). With typical publications dating back eleven years, this established field continues to shape CRM research, averaging 17.5 citations per year. Fig. 6 chronicles the field's evolution and spotlights some of its key works.

Early satisfaction research focused on product and service performance evaluation but evolved into broader assessments of relationship quality as firms recognized the long-term value of customer relationships (Gustafsson et al., 2005). This evolution paralleled Berry's (1983) shift from transactional marketing to relationship management, with satisfaction becoming the central measure of relationship health and a critical precursor to loyalty and profitability (Bolton & Lemon, 1999; Zeithaml, 2000).

As satisfaction research matured, CRM scholars examined how customer participation shapes relationship quality rather than merely measuring passive responses to firm actions. Co-production and involvement in service delivery enhance satisfaction through increased customization and control, connecting satisfaction research with experience design principles (Auh et al., 2007; Lemke et al., 2011). This aligned with the broader shift from viewing customers as recipients of value to active co-creators of experiences. Brand interactions enable customers to co-create personalized value, generating sensory, affective, intellectual, and behavioral responses that



(c)

Authors	Year	Title	Citations per year
Pansari and Kumar	2017	Customer engagement: the construct, antecedents, and consequences	146
Brakus et al.	2009	Brand Experience: What Is It? How Is It Measured? Does It Affect Loyalty	168
Gustafsson et al.	2005	The Effects of Customer Satisfaction, Relationship Commitment Dimensions, and Triggers on Customer Retention	53
Wolfinbarger and Gilly	2003	eTailQ: dimensionalizing, measuring and predicting etail quality	64
Tax et al.	1998	Customer Evaluations of Service Complaint Experiences: Implications for Relationship Marketing	54

Fig. 6. Developments in CRM research on satisfaction. *Notes:* **(a)** Accumulated publications per year, **(b)** accumulated citations per year, and **(c)** exemplary papers illustrating the nature of the CRM satisfaction research stream.

collectively shape satisfaction and engagement (Brakus et al., 2009; Pansari & Kumar, 2017).

The true test of customer relationships often emerges during service failures, which provide fertile context for understanding satisfaction dynamics. Service recovery research shows that effective complaint handling can restore satisfaction and even strengthen customer relationships (Gelbrich & Roschk, 2011; Tax et al., 1998). Relationship history creates an interesting paradox: strong prior relationships initially buffer against minor failures but can intensify negative reactions when recovery fails, creating a "love-becomes-hate effect" (Grégoire et al., 2009; Hess et al., 2003), suggesting that CRM must excel in both relationship building and recovery to maintain satisfaction across the customer lifecycle.

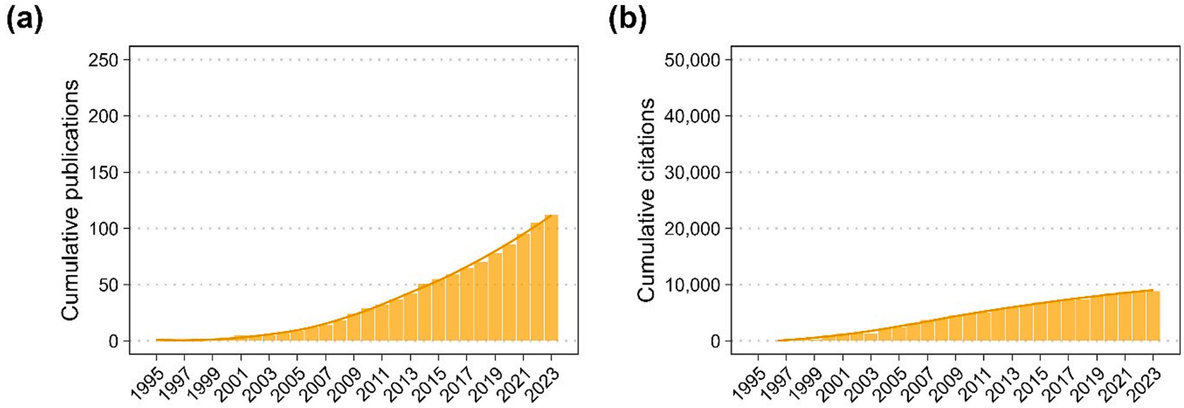
In an increasingly digital world, the way firms achieve and measure customer satisfaction is continuously evolving. Satisfaction in the digital space is often driven by distinct factors including convenience, website design, security, and personalization (Szymanski & Hise, 2000; Wolfinbarger & Gilly, 2003). The continued evolution of CRM points toward greater integration of satisfaction measures within comprehensive customer journey frameworks. To maintain relationship quality, firms must now ensure consistent experiences across a wide array of touchpoints, both digital and physical, in a landscape where customers seamlessly move between these environments (Kuehnl et al., 2019).

4.4. *CRM research on customer loyalty*

Customer satisfaction provides a crucial foundation for relationship quality, but loyalty research focuses on turning satisfied customers into loyal ones. This stream comprises 116 publications (11.3 % of 1,025) and maintains a steady presence, with each publication earning an average of 8.7 citations per year. With typical studies dating back about nine years, it remains a stable yet moderately evolving field (see Fig. 3). Fig. 7 displays its gradual development and highlights key contributions shaping this area of CRM research.

Loyalty research has moved beyond solely focusing on repeated purchases or behavioral loyalty also to consider attitudinal loyalty, driven by emotional commitment (Yi & Jeon, 2003). True loyalty requires both, as frequent purchases without emotional attachment indicate spurious loyalty—a growing challenge in competitive markets (Liu, 2007; Wallace et al., 2004). Yet, while loyalty programs effectively drive behavioral loyalty through rewards and status, fostering deeper attitudinal commitment based on satisfaction and trust remains essential for building lasting customer relationships that transcend mere transactions (Belli et al., 2022; Evanschitzky et al., 2012).

Loyalty programs remain a dominant CRM tool, though empirical evidence suggests their effectiveness depends on program design and self-selection of customers. Closed programs outperform open ones, and savings-based or exclusive rewards drive stronger engagement than generic discounts, which may backfire (Belli et al., 2022). Behavioral responses also differ: moderate buyers show the



(c)

Authors	Year	Title	Citations per year
Hult et al.	2019	Antecedents and Consequences of Customer Satisfaction: Do They Differ Across Online and Offline Purchases?	37
Herhausen et al.	2019	Loyalty Formation for Different Customer Journey Segments	26
Kushwaha and Shankar	2013	Are Multichannel Customers Really more Valuable? The Moderating Role of Product Category Characteristics	24
Kivetz et al.	2006	The Goal-Gradient Hypothesis Resurrected: Purchase Acceleration, Illusionary Goal Progress, and Customer Retention	30
Bolton et al.	2000	Implications of loyalty program membership and service experiences for customer retention and value	30

Fig. 7. Developments in CRM research on loyalty. *Notes:* **(a)** Accumulated publications per year, **(b)** accumulated citations per year, and **(c)** exemplary papers illustrating the nature of the CRM loyalty research stream.

most pronounced shifts, while heavy buyers, already at their spending ceiling, exhibit minimal change (Liu, 2007). Psychological mechanisms further shape outcomes, with goal-gradient effects accelerating purchases near loyalty reward thresholds (Dorotic et al., 2014; Kivetz et al., 2006) and asymmetric responses based on loyalty tier status (Wang et al., 2016).

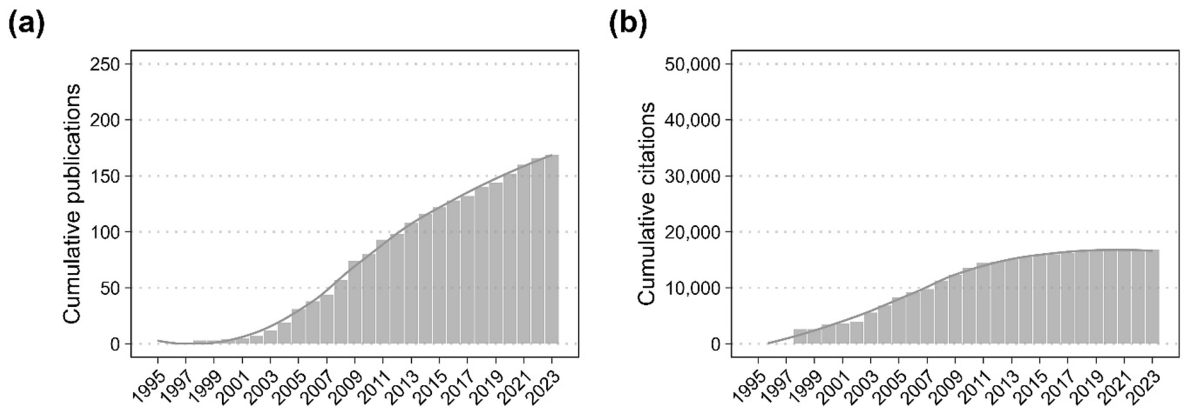
Beyond structured programs, multi-channel engagement drives loyalty through enhanced convenience and service delivery, with customers interacting across touchpoints showing higher retention despite variations by product category (Kushwaha & Shankar, 2013; Wallace et al., 2004). Adding physical stores to digital operations increases revenues primarily through purchase frequency, requiring careful management of cannibalization effects (Pauwels & Neslin, 2015). Loyalty formation mechanisms differ across channels—product satisfaction drives store-based loyalty while journey satisfaction is critical for omnichannel customers—with online loyalty being more value-driven and offline loyalty depending on quality perceptions (Herhausen et al., 2019; Hult et al., 2019).

In today's data-driven CRM landscape, personalization significantly enhances loyalty while facing new challenges. Whereas customer-specific recommendations boost purchase probability and retention, restrictions on personalization reduce engagement, especially for newer customers (Sun et al., 2024). Meanwhile, loyalty program effectiveness diminishes as customers join multiple competing programs, strategically allocating purchases to maximize rewards across firms (Khodakarami et al., 2024; Meyer-Waarden, 2007). This competitive dynamic requires firms to reinforce foundational loyalty drivers beyond formal programs, including strategic pricing (Gahler et al., 2023), optimized product assortments (Borle et al., 2005), and trust-building mechanisms like platform protection insurance (Luo et al., 2021). These trends reflect the need for CRM to shift from transactional loyalty tactics to holistic relationship management and building true loyalty in competitive markets.

4.5. CRM research on profitability

Customer loyalty research aims to retain customers, while the profitability stream aims to identify which relationships deliver the greatest value. Comprising 173 publications (16.9 % of 1,025), this long-established field, with typical studies dating back over twelve years, continues to evolve steadily. Despite its longevity, it receives comparably limited attention, averaging just 8 citations per year. Fig. 8 highlights the growing number of publications, with stagnating citations, and lists key contributions shaping this area of CRM research.

Research on customer profitability has evolved from basic transaction metrics to advanced models predicting customer lifetime value and optimizing resource allocation, helping firms identify valuable customer relationships (Borle et al., 2008; Gupta et al., 2006; Kumar, 2018; Venkatesan & Kumar, 2004). Customer relationships represent market-based assets that directly enhance shareholder value through accelerated cash flows and reduced volatility (Ryals, 2005; Srivastava et al., 1998). This financial connection elevated



(c)

Authors	Year	Title	Citations per year
Kumar et al.	2010	Undervalued or Overvalued Customers: Capturing Total Customer Engagement Value	66
Reinartz and Kumar	2003	The Impact of Customer Relationship Characteristics on Profitable Lifetime Duration	33
Reinartz and Kumar	2000	On the Profitability of Long-Life Customers in a Noncontractual Setting: An Empirical Investigation and Implications for Marketing	34
Srivastava et al.	1998	Market-Based Assets and Shareholder Value: A Framework for Analysis	53
Bolton	1998	A Dynamic Model of the Duration of the Customer's Relationship with a Continuous Service Provider: The Role of Satisfaction	46

Fig. 8. Developments in CRM research on profitability. *Notes:* **(a)** Accumulated publications per year, **(b)** accumulated citations per year, and **(c)** exemplary papers illustrating the nature of the CRM profitability research stream.

CRM from operational tactics to strategic investment decisions, with firms implementing value-based customer management substantially outperforming profit targets (Ryals, 2005).

The profitability journey begins with acquisition, as customer acquisition methods significantly influence lifetime value. Free-trial customers show lower retention but higher marketing responsiveness (Datta et al., 2015), while personalized trials enhance conversion and long-term value (Yoganarasimhan et al., 2023). Channel selection affects profitability dynamics, with web channel migration boosting short-term sales but potentially reducing loyalty (Ansari et al., 2008; Ansari & Mela, 2003). Ultimately, effective resource allocation between acquisition and retention maximizes profitability, with retention investments typically yielding higher returns (Reinartz et al., 2005).

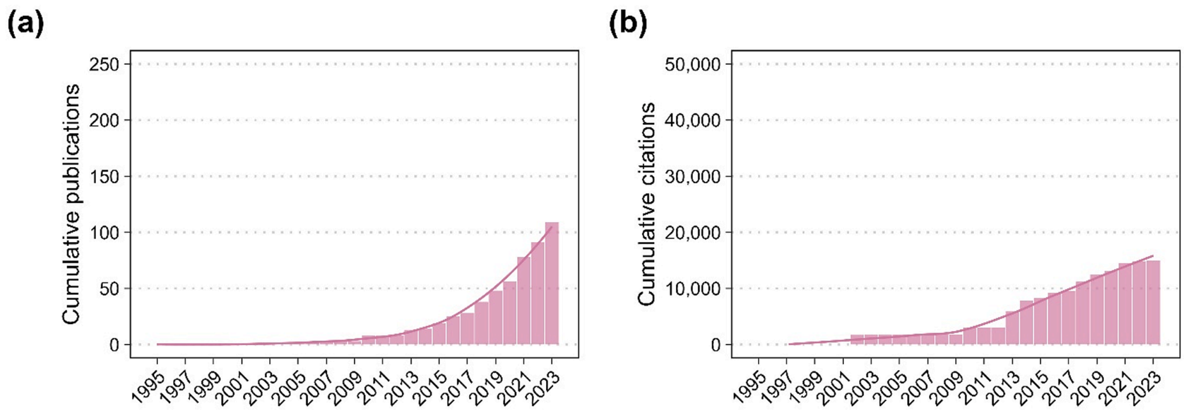
However, the assumption that customer retention always results in higher profitability is challenged by evidence of only moderate correlation between relationship duration and financial value, suggesting a need for nuanced profitability assessments (Bolton, 1998; Reinartz & Kumar, 2000, 2003; Fader & Hardie, 2009). Proactive CRM interventions, like retention campaigns, can sometimes reduce profitability by triggering churn (Ascarza et al., 2016; Feng et al., 2020; Lemmens & Gupta, 2020). Understanding causes of churn enables more effective retention strategies, as the impact of marketing interventions depends on whether churn risks are controllable or not (Braun & Schweidel, 2011; Luo, 2007, 2009).

Beyond direct economic value, customers drive profitability through referrals, social influence, and feedback (Kumar, 2018). This referral or word-of-mouth dimension has become a critical component of customer value assessment. Notably, referred customers have higher retention and contribution margins (Schmitt et al., 2011), while re-acquired customers may stay longer than new ones (McCarthy & Oblander, 2021). Subscription programs can further reinforce customer engagement, boosting customer equity (Iyengar et al., 2022). Identifying and nurturing profitable customers thus requires CRM models to consider both their economic and non-economic value impact.

4.6. *CRM research on community*

Loyalty programs help retain customers but often fail to foster deeper attitudinal loyalty, fueling interest in research on creating communities and belonging. As the youngest research stream, with articles dating back less than five years, this field is rapidly gaining traction, accumulating 115 publications (11.2 % of 1,025) and demonstrating the second-highest citation growth, averaging 26.8 citations per year. Fig. 9 visualizes the field's expansion and highlights key contributions shaping this emerging area of CRM research.

Research on enhancing customer relationships through communities has become a key CRM stream, examining how firms foster brand communities that create a sense of belonging (Brodie et al., 2013; McAlexander et al., 2002). These communities function as relational networks where customers connect with the brand, firm, products, and peers, fostering loyalty beyond transactional



(c)

Authors	Year	Title	Citations per year
Hughes et al.	2019	Driving Brand Engagement Through Online Social Influencers: An Empirical Investigation of Sponsored Blogging Campaigns	67
Lee et al.	2018	Advertising Content and Consumer Engagement on Social Media: Evidence from Facebook	92
Hollebeek et al.	2014	Consumer Brand Engagement in Social Media: Conceptualization, Scale Development and Validation	190
Brodie et al.	2013	Consumer engagement in a virtual brand community: An exploratory analysis	162
Verhoef et al.	2010	Customer Engagement as a New Perspective in Customer Management	46

Fig. 9. Developments in CRM research on community. *Notes:* **(a)** Accumulated publications per year, **(b)** accumulated citations per year, and **(c)** exemplary papers illustrating the nature of the CRM community research stream.

marketing (McAlexander et al., 2002; Verhoef et al., 2010). Customer-to-customer interactions and engagement in online brand communities reduce uncertainty, drive purchases, and enhance attitudinal loyalty more effectively than traditional loyalty programs (Adjei et al., 2010; Dhaoui & Webster, 2021).

Brand communities rely on both cognitive and affective engagement, with emotional bonds proving essential for true, long-term loyalty (Brodie et al., 2013; Eisingerich et al., 2019; Hollebeek et al., 2014). Corporate social responsibility initiatives strengthen these communities by fostering a “warm glow” effect, where customers feel part of a shared, meaningful mission (Habel et al., 2016; Homburg et al., 2013; Lacey et al., 2015). Community participation is shaped by motivation and reputation dynamics, as intrinsically motivated customers engage more deeply, while reputation signals enhance role clarity and connectedness—elements often missing in conventional loyalty programs (Chung et al., 2022; Hanson et al., 2019).

To sustain engagement, firms increasingly use interactive strategies. Gamification and digital content strengthen engagement by fostering interactive experiences and self-brand connections (Berger et al., 2018; Eisingerich et al., 2019). Additionally, marketer-generated content—whether informational or emotional—can further enhance participation across platforms, offering more holistic relationship-building than points-based loyalty schemes (Kumar et al., 2016; Lee et al., 2018; Shahbaznezhad et al., 2021). These strategies help firms shift from transactional engagement to sustained, community-driven loyalty.

Recognizing the limits of loyalty programs, firms increasingly position community management as a core CRM strategy (Verhoef et al., 2010). Communities create value beyond purchases by enabling co-creation, fostering emotional bonds, and strengthening attitudinal loyalty (Meire et al., 2019). Research highlights that well-designed online experiences incorporating social presence and community elements boost engagement, providing a competitive advantage that traditional incentives cannot (Bleier et al., 2019).

Community-building efforts also generate word-of-mouth and referral benefits. Engaged community members become brand advocates who organically promote the brand through their networks—connecting the community research stream back to profitability through customer referral value. This illustrates how CRM research streams interconnect: community engagement drives both attitudinal loyalty and measurable referral revenue.

5. Pathways into the future

The preceding analysis has traced the trajectory of CRM research from its early focus on satisfaction, loyalty, and profitability to its current emphasis on experience design, organizational capabilities, and community building. This evolution highlights how CRM has expanded from operational efficiency to become a strategic and holistic framework for value creation. The declining longevity of firms underscores the urgency of deepening our knowledge in this domain: as traditional product-based advantages erode faster than ever, understanding how customer relationships drive sustainable competitive advantage becomes critical.

Two forces now reshape how these relationships form and endure. Digitalization has shifted customer interactions from physical stores and call centers to digital touchpoints. These now include voice assistants, smart products, and platform ecosystems that mediate brand-customer interactions. AI participates directly in relationship building. ChatGPT and other large language models handle customer service, recommendation algorithms curate purchases, and autonomous agents make decisions on behalf of customers—so-called 'machine customers' (Bamberger et al., 2025). Today, customers routinely interact with AI more than humans across service, sales, and support. These technologies do not just automate existing CRM practices; they fundamentally alter who controls customer access, how loyalty forms, and where relationship value accumulates. Building on the historical and present-day understanding of CRM, the following section highlights key opportunities driven by these shifts and outlines a future research agenda in this field (see Table 5).

5.1. Future path 1: Customer relationships

Beyond traditional satisfaction research, marketing scholars have identified customer loyalty as crucial for maintaining successful customer relationships. The loyalty construct is defined as “a deeply held commitment to rebuy or repatronize a preferred product/service consistently in future” (Oliver, 1999, p. 34). Research in the academic CRM domain suggests that repeated purchases alone are insufficient for a holistic understanding of loyalty, emphasizing the role of attitudinal loyalty (Dick & Basu, 1994; Oliver, 1999). This attitudinal component provides a psychological explanation for consumers’ repurchasing behavior, driven by factors such as brand trust and affection (Chaudhuri & Holbrook, 2001). Digitalization and AI are now reshaping where and how customer relationships form and endure, as digital interactions increasingly shape attitudinal loyalty across touchpoints. Cultivating and maintaining attitudinal loyalty continues to be essential for brands to achieve economic stability in a competitive market environment (Lei et al., 2024).

Practitioners have recognized the importance of attitudinal loyalty as brands prioritize community-building and storytelling in their strategic agenda. Notable examples include Red Bull organizing and sponsoring action and extreme sports events, LEGO fostering customer engagement and co-creation through its LEGO Ideas platform, and Patagonia’s sustainability and activism-driven brand narrative. Increasingly, these strategies are orchestrated on digital platforms with AI-assisted content creation, curation, and moderation—tools that can individualize brand–customer interactions while putting brand authenticity under greater scrutiny. On the consumer side, loneliness and social distancing measures during the COVID-19 pandemic may have led customers to seek more consistent and trustworthy interactions (Das et al., 2021). Furthermore, ongoing loneliness trends, partly driven by digitally-mediated relationships, provide brands with additional opportunities for strategic positioning through customer relationships that emphasize

Table 5
Future research opportunities: impact of digitalization and AI on CRM (research).

Shift	Illustrative research questions
Customer relationships	• How do digital interactions influence the formation and maintenance of attitudinal loyalty? Will loyalty erode or strengthen as interactions digitize? • Is AI-driven individualization of customer contacts a viable approach to maintaining and improving loyalty? • To what extent does AI-driven and advanced targeting approaches lead to better, stronger, and more profitable relationships? • How can existing loyalty metrics and measurement scales be adapted to better capture attitudinal loyalty in a rapidly evolving digital and AI-driven environment? • How can brands leverage big data and machine learning to improve brand–customer fit at scale without compromising perceived brand authenticity? Will brands be able to ‘individualize’? • Are brands truly able to signal and sustain authenticity—and thereby foster strong customer connections—in an AI-mediated world? • Is the push towards (digital) self-service-everything detrimental to strong customer relationships? How should firms balance cost-to-serve with relationship quality? • Do data-rich interactions yield dividends? What is their return for customer profitability?
Customer access	• How does gaining or losing direct customer access transform a firm’s competitive position and strategic capabilities? What are the enabling digital pathways? • What determines success when transitioning from indirect to direct customer access (or vice versa)? What role do digital pathways play in that process? • How do customers manage their product and relationship needs when multiple entities (brand, retailer, platform) simultaneously claim ownership of the same brand–customer relationship? • How will digital technologies and AI reshape what constitutes ‘meaningful’ customer access? • What role do agentic AI and shopping agents play in the formation or erosion of direct customer access? • How do agentic AI and shopping agents alter ownership of customer access?
Customer communities	• How can brands effectively acquire and encourage customers to engage in crowd-sending on flagship platforms? What is the role of digital mechanisms in that context? • How can AI amplify crowd-sourcing and crowd-sending on brand flagship platforms while safeguarding quality, safety, and community norms? • How can AI effectively extend the Guidance and Inspiration blocks within brand flagship platforms? • How can the return on investment (ROI) of community-building and platformization efforts be measured accurately? • Which key performance indicators (KPIs), beyond customer engagement figures, can holistically capture the success of brand community-building and platformization strategies? • How can communities be leveraged (via digital mechanisms) to enable selling and access to new customers? • How can AI and digital tools be deployed to diagnose customer community health?

human touch.

Although attitudinal loyalty exists and is pursued by brands, it is inherently fragile and difficult to maintain. For example, service failures without adequate recovery efforts lead to significantly lower customer satisfaction (Maxham & Netemeyer, 2002), increasing the likelihood of brand switching. When switching costs are high, however, customers tend to be less sensitive to perceived satisfaction (Hauser et al., 1994), making service failures less detrimental to brands. Yet, switching has become much easier in recent years due to advancements such as digitalization, AI, and social media. While these developments enhance brands' ability to target and personalize ads, they also pose risks by enabling more fluid negative online feedback and brand firestorms (Herhausen et al., 2019). At the same time, the push towards (digital) self-service-everything can improve cost-to-serve but may weaken perceived relationship quality if the human–AI balance is not carefully calibrated.

These developments push brands and researchers to engage with increasingly informed and demanding customers, making the maintenance of attitudinal loyalty an increasingly complex challenge. Despite rapid digitalization, its impact on fostering attitudinal loyalty remains unclear. While AI-driven personalization and advanced targeting promise more relevant, timely contact and the potential to individualize interactions at scale, it remains uncertain whether they strengthen or weaken perceived brand authenticity as human encounters give way to AI-mediated ones. At the same time, the push towards digital self-service-everything lowers cost-to-serve but may weaken relationship quality unless the human-AI balance is carefully managed. In this evolving landscape, brands and researchers must reassess whether existing metrics effectively capture attitudinal loyalty in AI-mediated episodes (e.g., conversational and AI-agent-driven interactions) and link 'data-rich' interactions to economic outcomes. Understanding these dynamics is critical: How does AI shape attitudinal loyalty? When do digital interactions strengthen versus erode customer relationships? What is the economic return of data-rich, AI-mediated contact? These questions demand future research that examines how and when digitalization and AI shape attitudinal loyalty, customer relationships, and ultimately customer profitability. Answering them will help firms understand whether AI-mediated relationships may offer a path to more enduring competitive advantage in an era of declining firm longevity.

5.2. *Future path 2: Customer access*

Customer access—the ability to directly reach, interact with, and influence customers at the moment of need or decision—has become a critical factor in competitive strategy. Firms that control primary customer interfaces can gather data, influence purchase decisions, and capture value, while those lacking direct access face challenges regardless of product quality or pricing (Reinartz et al., 2019; Schauerte et al., 2024). This shift marks a transformation in CRM from analyzing known customers to strategically establishing and maintaining access points. Digitalization and AI now reshape how customers discover, evaluate, and purchase products, and the entity that owns the primary interface often controls the customer relationship itself, reshaping competition across industries (Bei & Gielens, 2023).

Competition for customer access has intensified due to digital transformation and shifting consumer behaviors. Physical retail stores and salespeople once dominated customer interactions, but e-commerce platforms took control, followed by mobile apps and digital ecosystems. Today, smart devices, voice assistants, AI agents, and connected products increasingly mediate customer access, enabling real-time brand interactions at the moment of need (Melzner et al., 2023; Raff et al., 2020). These shifts are not merely technological but structural: access has evolved from discrete to continuous, embedded interactions (Petersen et al., 2022). Firms must now navigate platform algorithms, AI-mediated recommendations, and data-driven orchestration that increasingly determine who holds customer access (Kalayci et al., 2024).

The growing importance of customer access is reshaping market power. For example, Disney's launch of Disney + reclaimed direct customer relationships from streaming platforms, affecting competitors like Netflix and traditional television providers (Schauerte et al., 2024). Peloton bypassed gyms and fitness providers through connected exercise equipment, while bedding brand Casper, after pioneering direct-to-consumer sales, struggled when expanding into wholesale distribution, weakening its customer relationships and reducing margins. These cases highlight a core trade-off: broader distribution can drive short-term sales but may dilute relationship ownership and long-term control (Maier & Wieringa, 2021). Moreover, new digital intermediaries—including voice commerce platforms and AI-driven marketplaces, and AI agents—are emerging as gatekeepers, challenging firms to either establish direct access or risk losing customer relationships (Breugelmans et al., 2023).

The evolving nature of customer access presents key research challenges. Gaining or losing direct customer access can transform a firm's competitive position and strategic capabilities, with specific digital pathways (e.g., data rights, consent flows, identity and payment rails, and app or marketplace presence) enabling or constraining such shifts. Firms differ markedly in their ability to transition from indirect to direct access (and vice versa), underscoring the need to understand the organizational enablers and barriers to successful reconfiguration. At the same time, brands, retailers, platforms, and AI agents increasingly claim ownership over the same brand–customer relationship, raising questions about how customers manage overlapping interfaces and where control effectively resides. As digital technologies and AI mediate more interactions, the field must clarify what constitutes 'meaningful' customer access (e.g., sufficient frequency, recency, depth, and permission to influence decisions) and how it is defended. These challenges demand systematic research: How do digital pathways enable or prevent shifts in customer access? What organizational capabilities support successful transitions? How do customers navigate competing claims of relationship ownership? How will AI agents reshape access dynamics? Future research must address these questions to understand meaningful customer engagement in an era of AI-driven interactions, voice commerce, and smart environments (Reinartz et al., 2019). As the average firm lifespans keep dropping, controlling customer access may decide who maintains a sustainable competitive advantage and survives longer.

5.3. Future path 3: Customer communities

Recognizing the importance of maintaining customer relationships and controlling the customer interface, brands are investing heavily in building and accessing communities of loyal customers. Brand communities—"a specialized, non-geographically bound community, based on a structured set of social relationships among admirers of a brand" (Muniz & O'Guinn, 2001, p. 412)—strengthen customers' connection to the brand through feelings of belonging, emotional attachment, and social interactions (McAlexander et al., 2002). For brands, communities offer numerous indispensable competitive advantages, such as enhancing customer interaction and communication, fostering brand trust and loyalty, and driving product innovation and enhancement (Algesheimer et al., 2005; Schau et al., 2009). Increasingly, these advantages are orchestrated through digitalization and AI, which shape how communities are built, maintained, and governed.

In markets increasingly characterized by consumers seeking more than mere transactions, brand managers recognize the strategic role of social commerce in embedding product discovery and purchasing experiences within social media communities. Already in 2020, 60 % of online consumers reported having made at least one purchase via social media (Nielsen, 2022), and the significance of social commerce is expected to continue growing—by 2025, global social commerce sales are projected to reach 1.2 trillion USD (Accenture, 2022). Moving beyond social commerce, brands are increasingly developing their own flagship platforms, enabling them to diversify their value propositions and extend beyond their original core business of product sales by fostering deeper consumer engagement and building their own brand communities. Other than online retail platforms, brand flagship platforms offer a broad variety of complementary services. Leading sports brands such as Nike and Adidas exemplify this trend, providing services like sports tracking, training guides, and story blogs. Within these environments, digital mechanisms and AI can both amplify and safeguard community activity—extending core 'Guidance' and 'Inspiration' blocks while supporting content creation, curation, and moderation. These platforms also enable customers to participate in crowd-sending activities, such as discussions, photo and video uploads, or playlist creation (Wichmann et al., 2022), representing a vital source of co-creation and customer value for brands.

Brands extensively invest in building communities from and for their customers while facing highly digital, well-informed, and increasingly demanding consumers. A central challenge is how to acquire and encourage customers to engage in crowd-sending on flagship platforms and which digital mechanisms most effectively lower participation frictions and sustain contribution quality. At the same time, AI promises to amplify crowdsourcing and crowd-sending—provided that quality, safety, and community norms are protected. Accurate evaluation of these efforts requires measuring the return on investment (ROI) of community-building and platformization with metrics that go beyond engagement figures, including outcomes such as selling and access to new customers (Wichmann et al., 2022). Finally, AI and digital tools could be deployed to diagnose community health, offering early-warning signals and actionable insights for strengthening brand communities over time. Understanding these dynamics requires research that addresses core questions: How can brands effectively acquire and retain community members through digital mechanisms? How can AI amplify crowd-sending while protecting quality and norms? What metrics accurately capture community-building ROI beyond engagement? How can AI diagnose and strengthen community health? These research directions will help brands leverage communities as strategic assets in an AI-driven marketplace. Communities may provide the lasting customer relationships firms need to stay competitive as markets shift faster than ever.

6. Conclusion

The evolution of Customer Relationship Management (CRM) research over the past three decades underscores a profound shift in scholarly attention—from measuring satisfaction and profitability to designing holistic customer experiences, building organizational capabilities, and fostering community-driven engagement. This transition reflects the growing recognition that sustainable competitive advantages to ensure firm longevity no longer stems solely from superior products or transactions but from cultivating long-term, emotionally resonant customer relationships. By mapping six key research streams—experience, organization, satisfaction, loyalty, profitability, and community—this study highlights how CRM scholarship has progressively broadened its scope to encompass both the tangible and intangible drivers of customer value.

The domain has come a long way! The initial research questions guiding this review asked how CRM scholarship has evolved, what themes have dominated the field, and where gaps persist. The findings reveal a nuanced answer: while traditional areas such as satisfaction and profitability remain foundational, they are increasingly complemented by research on attitudinal loyalty, community-building, and digital transformation. Yet, significant gaps remain in understanding how emerging technologies—AI, machine learning, and the ever-present digital platforms—reshape customer relationships, access, and loyalty metrics. Similarly, the strategic value of customer communities, particularly in platform-based ecosystems, requires further theoretical and empirical exploration.

Looking ahead, CRM research must bridge these gaps by integrating technological, organizational, and behavioral perspectives. Future studies should not only measure (outcomes) but also examine how firms co-create meaning and authenticity with customers, especially against the backdrop of digitalization and AI. By linking the historical foundations of CRM with its future questions, this review uncovers the field's evolution. Thereby offering both a roadmap for practice and a rich agenda for a promising and ongoing scholarly inquiry.

CRediT authorship contribution statement

Werner J. Reinartz: Writing – review & editing, Writing – original draft, Methodology, Formal analysis, Data curation, Conceptualization.

Acknowledgments

The author thanks Boas Bamberger and Vincent Weidenbörner for valuable research assistance. This manuscript has been written on request after receiving the 2023 EMAC Distinguished Scholar Award.

Data availability

Data will be made available on request.

References

Accenture. (2022, January 2). Why Shopping's Set for a Social Revolution. https://www.accenture.com/us-en/insights/software-platforms/why-shopping-set-social-revolution.

Adjei, M. T., Noble, S. M., & Noble, C. H. (2010). The influence of C2C communications in online brand communities on customer purchase behavior. *Journal of the Academy of Marketing Science, 38*(5), 634–653. https://doi.org/10.1007/s11747-009-0178-5

Algesheimer, R., Dholakia, U. M., & Herrmann, A. (2005). The Social Influence of Brand Community: Evidence from European Car Clubs. *Journal of Marketing, 69*(3), 19–34. https://doi.org/10.1509/jmkg.69.3.19.66363

Ansari, A., & Mela, C. F. (2003). E-Customization. *Journal of Marketing Research, 40*(2), 131–145. https://doi.org/10.1509/jmkr.40.2.131.19224

Ansari, A., Mela, C. F., & Neslin, S. A. (2008). Customer Channel Migration. *Journal of Marketing Research, 45*(1), 60–76. https://doi.org/10.1509/jmkr.45.1.60

Ascarza, E., Iyengar, R., & Schleicher, M. (2016). The Perils of Proactive Churn Prevention using Plan Recommendations: Evidence from a Field Experiment. *Journal of Marketing Research, 53*(1), 46–60. https://doi.org/10.1509/jmr.13.0483

Auh, S., Bell, S. J., McLeod, C. S., & Shih, E. (2007). Co-production and customer loyalty in financial services. *Journal of Retailing, 83*(3), 359–370. https://doi.org/10.1016/j.jretai.2007.03.001

Bamberger, B., Reinartz, W. J., & Ulaga, W. (2025). Navigating the future of B2B marketing: The transformative impact of the industrial metaverse. *Journal of Business Research, 188*, Article 115057. https://doi.org/10.1016/j.jbusres.2024.115057

Bei, Z., & Gielens, K. (2023). The One-Party Versus Third-Party Platform Conundrum: How can Brands thrive? *Journal of Marketing, 87*(2), 253–274. https://doi.org/10.1177/00222429221116803

Belli, A., O'Rourke, A.-M., Carrillat, F. A., Pupovac, L., Melnyk, V., & Napolova, E. (2022). 40 years of loyalty programs: How effective are they? generalizations from a meta-analysis. *Journal of the Academy of Marketing Science, 50*(1), 147–173. https://doi.org/10.1007/s11747-021-00804-z

Berger, A., Schlager, T., Sprott, D. E., & Herrmann, A. (2018). Gamified interactions: Whether, when, and how games facilitate self–brand connections. *Journal of the Academy of Marketing Science, 46*(4), 652–673. https://doi.org/10.1007/s11747-017-0530-0

Berry, L. L. (1983). *Relationship Marketing* (L. L. Berry, G. L. Shostack, & G. D. Upah, Eds.; pp. 25–80). American Marketing Association.

Blei, D. M., Ng, A. N., & Jordan, M. I. (2003). Latent Dirichlet Allocation. *Journal of Machine Learning Research, 3*, 993–1022.

Bleier, A., Harmeling, C. M., & Palmatier, R. W. (2019). Creating Effective Online Customer Experiences. *Journal of Marketing, 83*(2), 98–119. https://doi.org/10.1177/0022242918809930

Bohling, T., Bowman, D., LaValle, S., Mittal, V., Narayandas, D., Ramani, G., & Varadarajan, R. (2006). CRM Implementation: Effectiveness Issues and Insights. *Journal of Service Research, 9*(2), 184–194. https://doi.org/10.1177/1094670506293573

Bolton, R. N. (1998). A Dynamic Model of the Duration of the Customer's Relationship with a Continuous Service Provider: The Role of Satisfaction. *Marketing Science, 17*(1), 45–65. https://doi.org/10.1287/mksc.17.1.45

Bolton, R. N., & Lemon, K. N. (1999). A Dynamic Model of Customers' Usage of Services: Usage as an Antecedent and consequence of Satisfaction. *Journal of Marketing Research, 36*(2), 171–186. https://doi.org/10.1177/002224379903600203

Borah, A., Bonetti, F., Calma, A., & Martí-Parreño, J. (2023). The Journal of the Academy of Marketing Science at 50: A historical analysis. *Journal of the Academy of Marketing Science, 51*(1), 222–243. https://doi.org/10.1007/s11747-022-00905-3

Borle, S., Boatwright, P., Kadane, J. B., Nunes, J. C., & Galit, S. (2005). The effect of Product Assortment changes on Customer Retention. *Marketing Science, 24*(4), 616–622. https://doi.org/10.1287/mksc.1050.0121

Borle, S., Singh, S. S., & Jain, D. C. (2008). Customer Lifetime Value Measurement. *Management Science, 54*(1), 100–112. https://doi.org/10.1287/mnsc.1070.0746

Boulding, W., Staelin, R., Ehret, M., & Johnston, W. J. (2005). A Customer Relationship Management Roadmap: What is known, potential pitfalls, and where to go. *Journal of Marketing, 69*(4), 155–166. https://doi.org/10.1509/jmkg.2005.69.4.155

Brakus, J. J., Schmitt, B. H., & Zarantonello, L. (2009). Brand Experience: What is it? how is it measured? does it Affect loyalty? *Journal of Marketing, 73*(3), 52–68. https://doi.org/10.1509/jmkg.73.3.052

Braun, M., & Schweidel, D. A. (2011). Modeling Customer Lifetimes with Multiple Causes of Churn. *Marketing Science, 30*(5), 881–902. https://doi.org/10.1287/mksc.1110.0665

Breugelmans, E., Altenburg, L., Lehmkuhle, F., Krafft, M., Lamey, L., & Roggeveen, A. L. (2023). The Future of Physical Stores: Creating reasons for Customers to Visit. *Journal of Retailing, 99*(4), 532–546. https://doi.org/10.1016/j.jretai.2023.10.005

Brodie, R. J., Hollebeek, L. D., Jurić, B., & Ilić, A. (2011). Customer Engagement: Conceptual Domain, Fundamental Propositions, and Implications for Research. *Journal of Service Research, 14*(3), 252–271. https://doi.org/10.1177/1094670511411703

Brodie, R. J., Ilic, A., Juric, B., & Hollebeek, L. (2013). Consumer engagement in a virtual brand community: An exploratory analysis. *Journal of Business Research, 66*(1), 105–114. https://doi.org/10.1016/j.jbusres.2011.07.029

Bult, J. R., & Wansbeek, T. (1995). Optimal selection for direct mail. *Marketing Science, 14*(4), 378–394. https://doi.org/10.1287/mksc.14.4.378

Chaudhuri, A., & Holbrook, M. B. (2001). The Chain of Effects from Brand Trust and Brand Affect to Brand Performance: The Role of brand loyalty. *Journal of Marketing, 65*(2), 81–93. https://doi.org/10.1509/jmkg.65.2.81.18255

Chung (Jae), J., Johar, G. V., Li, Y., Netzer, O., & Pearson, M. (2022). Mining Consumer Minds: Downstream Consequences of Host Motivations for Home-Sharing Platforms. *Journal of Consumer Research, 48*(5), 817–838. https://doi.org/10.1093/jcr/ucab034

Das, G., Jain, S. P., Maheswaran, D., Slotegraaf, R. J., & Srinivasan, R. (2021). Pandemics and marketing: Insights, impacts, and research opportunities. *Journal of the Academy of Marketing Science, 49*(5), 835–854. https://doi.org/10.1007/s11747-021-00786-y

Datta, H., Foubert, B., & Van Heerde, H. J. (2015). The Challenge of Retaining Customers acquired with Free Trials. *Journal of Marketing Research, 52*(2), 217–234. https://doi.org/10.1509/jmr.12.0160

De Keyser, A., Verleye, K., Lemon, K. N., Keiningham, T. L., & Klaus, P. (2020). Moving the Customer Experience Field Forward: Introducing the Touchpoints, Context, Qualities (TCQ) Nomenclature. *Journal of Service Research, 23*(4), 433–455. https://doi.org/10.1177/1094670520928390

Dhaoui, C., & Webster, C. M. (2021). Brand and consumer engagement behaviors on Facebook brand pages: Let's have a (positive) conversation. *International Journal of Research in Marketing, 38*(1), 155–175. https://doi.org/10.1016/j.ijresmar.2020.06.005

Dick, A. S., & Basu, K. (1994). Customer loyalty: Toward an Integrated Conceptual Framework. *Journal of the Academy of Marketing Science, 22*(2), 99–113. https://doi.org/10.1177/0092070394222001

Dorotic, M., Verhoef, P. C., Fok, D., & Bijmolt, T. H. A. (2014). Reward redemption effects in a loyalty program when customers choose how much and when to redeem. *International Journal of Research in Marketing, 31*(4), 339–355. https://doi.org/10.1016/j.ijresmar.2014.06.001

Eisingerich, A. B., Marchand, A., Fritze, M. P., & Dong, L. (2019). Hook vs. hope: How to enhance customer engagement through gamification. *International Journal of Research in Marketing, 36*(2), 200–215. https://doi.org/10.1016/j.ijresmar.2019.02.003

Evanschitzky, H., Ramaseshan, B., Woisetschläger, D. M., Richelsen, V., Blut, M., & Backhaus, C. (2012). Consequences of customer loyalty to the loyalty program and to the company. *Journal of the Academy of Marketing Science, 40*(5), 625–638. https://doi.org/10.1007/s11747-011-0272-3

Fader, P. S., & Hardie, B. G. (2009). Probability models for customer-base analysis. *Journal of Interactive Marketing, 23*(1), 61–69. https://doi.org/10.1016/j.intmar.2008.11.003

Feng, H., Morgan, N. A., & Rego, L. L. (2020). The impact of unprofitable customer management strategies on shareholder value. *Journal of the Academy of Marketing Science, 48*(2), 246–269. https://doi.org/10.1007/s11747-019-00686-2

Gahler, M., Klein, J. F., & Paul, M. (2023). Customer Experience: Conceptualization, Measurement, and Application in Omnichannel Environments. *Journal of Service Research, 26*(2), 191–211. https://doi.org/10.1177/10946705221126590

Garbarino, E., & Johnson, M. S. (1999). The Different Roles of Satisfaction, Trust, and Commitment in Customer Relationships. *Journal of Marketing, 63*(2), 70–87. https://doi.org/10.1177/002224299906300205

Gelbrich, K., & Roschk, H. (2011). A Meta-Analysis of Organizational Complaint Handling and Customer responses. *Journal of Service Research, 14*(1), 24–43. https://doi.org/10.1177/1094670510387914

Gönül, F., & Shi, M. Z. (1998). Optimal mailing of catalogs: a new methodology using estimable structural dynamic programming models. *Management Science, 44*(9), 1249–1262. https://doi.org/10.1287/mnsc.44.9.1249

Grégoire, Y., Tripp, T. M., & Legoux, R. (2009). When Customer love turns into Lasting Hate: The Effects of Relationship Strength and Time on Customer revenge and Avoidance. *Journal of Marketing, 73*(6), 18–32. https://doi.org/10.1509/jmkg.73.6.18

Gupta, S., Hanssens, D., Hardie, B., Kahn, W., Kumar, V., Lin, N., Ravishanker, N., & Sriram, S. (2006). Modeling Customer Lifetime Value. *Journal of Service Research, 9*(2), 139–155. https://doi.org/10.1177/1094670506293810

Gustafsson, A., Johnson, M. D., & Roos, I. (2005). The Effects of Customer Satisfaction, Relationship Commitment Dimensions, and Triggers on Customer Retention. *Journal of Marketing, 69*(4), 210–218. https://doi.org/10.1509/jmkg.2005.69.4.210

Habel, J., Schons, L. M., Alavi, S., & Wieseke, J. (2016). Warm Glow or Extra Charge? the Ambivalent effect of Corporate Social Responsibility Activities on Customers' Perceived Price Fairness. *Journal of Marketing, 80*(1), 84–105. https://doi.org/10.1509/jm.14.0389

Hanson, S., Jiang, L., & Dahl, D. (2019). Enhancing consumer engagement in an online brand community via user reputation signals: A multi-method analysis. *Journal of the Academy of Marketing Science, 47*(2), 349–367. https://doi.org/10.1007/s11747-018-0617-2

Harmeling, C. M., Moffett, J. W., Arnold, M. J., & Carlson, B. D. (2017). Toward a theory of customer engagement marketing. *Journal of the Academy of Marketing Science, 45*(3), 312–335. https://doi.org/10.1007/s11747-016-0509-2

Hauser, J. R., Simester, D. I., & Wernerfelt, B. (1994). Customer Satisfaction Incentives. *Marketing Science, 13*(4), 327–350. https://doi.org/10.1287/mksc.13.4.327

Hennig-Thurau, T., Aliman, D. N., Herting, A. M., Cziehso, G. P., Linder, M., & Kübler, R. V. (2023). Social interactions in the metaverse: Framework, initial evidence, and research roadmap. *Journal of the Academy of Marketing Science, 51*(4), 889–913. https://doi.org/10.1007/s11747-022-00908-0

Herhausen, D., Kleinlercher, K., Verhoef, P. C., Emrich, O., & Rudolph, T. (2019). Loyalty Formation for different Customer Journey Segments. *Journal of Retailing, 95*(3), 9–29. https://doi.org/10.1016/j.jretai.2019.05.001

Herhausen, D., Ludwig, S., Grewal, D., Wulf, J., & Schoegel, M. (2019). Detecting, Preventing, and Mitigating Online Firestorms in Brand Communities. *Journal of Marketing, 83*(3), 1–21. https://doi.org/10.1177/0022242918822300

Hess, R. L., Jr., Ganesan, S., & Klein, N. M. (2003). Service failure and Recovery: The Impact of Relationship Factors on Customer Satisfaction. *Journal of the Academy of Marketing Science, 31*(2), 127–145. https://doi.org/10.1177/0092070302250898

Hillebrand, B., Nijholt, J. J., & Nijssen, E. J. (2011). Exploring CRM effectiveness: An institutional theory perspective. *Journal of the Academy of Marketing Science, 39*(4), 592–608. https://doi.org/10.1007/s11747-011-0248-3

Holbrook, M. B., & Hirschman, E. C. (1982). The Experiential Aspects of Consumption: Consumer Fantasies, feelings, and Fun. *Journal of Consumer Research, 9*(2), 132. https://doi.org/10.1086/208906

Hollebeek, L. D., Glynn, M. S., & Brodie, R. J. (2014). Consumer Brand Engagement in Social Media: Conceptualization, Scale Development and Validation. *Journal of Interactive Marketing, 28*(2), 149–165. https://doi.org/10.1016/j.intmar.2013.12.002

Hollebeek, L. D., Srivastava, R. K., & Chen, T. (2019). S-D logic–informed customer engagement: Integrative framework, revised fundamental propositions, and application to CRM. *Journal of the Academy of Marketing Science, 47*, 161–185. https://doi.org/10.1007/s11747-016-0494-5

Homburg, C., Jozić, D., & Kuehnl, C. (2017). Customer experience management: Toward implementing an evolving marketing concept. *Journal of the Academy of Marketing Science, 45*(3), 377–401. https://doi.org/10.1007/s11747-015-0460-7

Homburg, C., Stierl, M., & Bornemann, T. (2013). Corporate Social Responsibility in Business-to-Business Markets: How Organizational Customers Account for Supplier Corporate Social Responsibility Engagement. *Journal of Marketing, 77*(6), 54–72. https://doi.org/10.1509/jm.12.0089

Homburg, C., & Tischer, M. (2023). Customer journey management capability in business-to-business markets: Its bright and dark sides and overall impact on firm performance. *Journal of the Academy of Marketing Science, 51*(5), 1046–1074. https://doi.org/10.1007/s11747-023-00923-9

Hoyer, W. D., Kroschke, M., Schmitt, B., Kraume, K., & Shankar, V. (2020). Transforming the Customer Experience through New Technologies. *Journal of Interactive Marketing, 51*(1), 57–71. https://doi.org/10.1016/j.intmar.2020.04.001

Hult, G. T. M., Sharma, P. N., Morgeson, F. V., & Zhang, Y. (2019). Antecedents and Consequences of Customer Satisfaction: Do they Differ across Online and Offline Purchases? *Journal of Retailing, 95*(1), 10–23. https://doi.org/10.1016/j.jretai.2018.10.003

Hunter, G. K., & Perreault, W. D. (2007). Making Sales Technology Effective. *Journal of Marketing, 71*(1), 16–34. https://doi.org/10.1509/jmkg.71.1.016

Iyengar, R., Park, Y.-H., & Yu, Q. (2022). The Impact of Subscription Programs on Customer Purchases. *Journal of Marketing Research, 59*(6), 1101–1119. https://doi.org/10.1177/00222437221080163

Jaakkola, E., & Alexander, M. (2014). The Role of Customer Engagement Behavior in Value Co-Creation: A Service System Perspective. *Journal of Service Research, 17*(3), 247–261. https://doi.org/10.1177/1094670514529187

Jayachandran, S., Sharma, S., Kaufman, P., & Raman, P. (2005). The Role of Relational Information Processes and Technology Use in Customer Relationship Management. *Journal of Marketing, 69*(4), 177–192. https://doi.org/10.1509/jmkg.2005.69.4.177

Kalayci, E., Becker, J. U., & Barrot, C. (2024). Understanding customers' choice for digital D2C versus multi-brand operations. *Journal of Retailing, 100*(2), 256–273. https://doi.org/10.1016/j.jretai.2024.02.001

Khodakarami, F., Andrew Petersen, J., & Venkatesan, R. (2024). Customer behavior across competitive loyalty programs. *Journal of the Academy of Marketing Science, 52*(3), 892–913. https://doi.org/10.1007/s11747-023-00965-z

Kivetz, R., Urminsky, O., & Zheng, Y. (2006). The Goal-Gradient Hypothesis Resurrected: Purchase Acceleration, Illusionary Goal Progress, and Customer Retention. *Journal of Marketing Research, 43*(1), 39–58. https://doi.org/10.1509/jmkr.43.1.39

Kuehnl, C., Jozic, D., & Homburg, C. (2019). Effective customer journey design: Consumers' conception, measurement, and consequences. *Journal of the Academy of Marketing Science, 47*(3), 551–568. https://doi.org/10.1007/s11747-018-00625-7

Kumar, A., Bezawada, R., Rishika, R., Janakiraman, R., & Kannan, P. K. (2016). From Social to Sale: The Effects of Firm-Generated Content in Social Media on Customer Behavior. *Journal of Marketing, 80*(1), 7–25. https://doi.org/10.1509/jm.14.0249

Kumar, V. (2018). A Theory of Customer Valuation: Concepts, Metrics, strategy, and Implementation. *Journal of Marketing, 82*(1), 1–19. https://doi.org/10.1509/jm.17.0208

Kumar, V., Jones, E., Venkatesan, R., & Leone, R. P. (2011). Is Market Orientation a source of Sustainable Competitive Advantage or simply the cost of competing? *Journal of Marketing, 75*(1), 16–30. https://doi.org/10.1509/jm.75.1.16

Kumar, V., & Pansari, A. (2016). Competitive Advantage through Engagement. *Journal of Marketing Research, 53*(4), 497–514. https://doi.org/10.1509/jmr.15.0044

Kumar, V., Rajan, B., Gupta, S., & Pozza, I. D. (2019). Customer engagement in service. *Journal of the Academy of Marketing Science, 47*(1), 138–160. https://doi.org/10.1007/s11747-017-0565-2

Kumar, V., & Reinartz, W. (2016). Creating Enduring Customer Value. *Journal of Marketing, 80*(6), 36–68. https://doi.org/10.1509/jm.15.0414
Kumar, V., & Reinartz, W. (2018a). Concepts of Customer Value. In I. V. Kumar, & W. Reinartz (Eds.), *Customer Relationship Management* (pp. 17–29). Berlin Heidelberg: Springer. https://doi.org/10.1007/978-3-662-55381-7_2.
Kumar, V., & Reinartz, W. (2018b). Strategic CRM Today. In I. V. Kumar, & W. Reinartz (Eds.), *Customer Relationship Management* (pp. 3–16). Berlin Heidelberg: Springer. https://doi.org/10.1007/978-3-662-55381-7_1.
Kushwaha, T., & Shankar, V. (2013). Are Multichannel Customers really more valuable? the Moderating Role of Product Category Characteristics. *Journal of Marketing, 77*(4), 67–85. https://doi.org/10.1509/jm.11.0297
Lacey, R., Kennett-Hensel, P. A., & Manolis, C. (2015). Is corporate social responsibility a motivator or hygiene factor? Insights into its bivalent nature. *Journal of the Academy of Marketing Science, 43*(3), 315–332. https://doi.org/10.1007/s11747-014-0390-9
Lee, D., Hosanagar, K., & Nair, H. S. (2018). Advertising Content and Consumer Engagement on Social Media: Evidence from Facebook. *Management Science, 64*(11), 5105–5131. https://doi.org/10.1287/mnsc.2017.2902
Lei, Y., Shen, J., Yang, E., & Zhai, X. (2024). On the Profitability of Loyalty. *Marketing Science*, mksc.2022.0109. Doi: 10.1287/mksc.2022.0109.
Lemke, F., Clark, M., & Wilson, H. (2011). Customer experience quality: An exploration in business and consumer contexts using repertory grid technique. *Journal of the Academy of Marketing Science, 39*(6), 846–869. https://doi.org/10.1007/s11747-010-0219-0
Lemmens, A., & Gupta, S. (2020). Managing Churn to Maximize Profits. *Marketing Science, 39*(5), 956–973. https://doi.org/10.1287/mksc.2020.1229
Lemon, K. N., & Verhoef, P. C. (2016). Understanding Customer Experience throughout the Customer Journey. *Journal of Marketing, 80*(6), 69–96. https://doi.org/10.1509/jm.15.0420
Levitt, T. (1969). *The marketing mode: Pathways to corporate growth*. McGraw-Hill.
Li, F., Larimo, J., & Leonidou, L. C. (2021). Social media marketing strategy: Definition, conceptualization, taxonomy, validation, and future agenda. *Journal of the Academy of Marketing Science, 49*(1), 51–70. https://doi.org/10.1007/s11747-020-00733-3
Li, H., Alice, & Ma, L. (2020). Charting the Path to Purchase using Topic Models. *Journal of Marketing Research., 57*(6), 1019–1036. https://doi.org/10.1177/0022243720954376
Liu, Y. (2007). The Long-Term Impact of loyalty Programs on Consumer Purchase Behavior and loyalty. *Journal of Marketing, 71*(4), 19–35. https://doi.org/10.1509/jmkg.71.4.019
Luo, X. (2007). Consumer negative Voice and Firm-Idiosyncratic Stock returns. *Journal of Marketing, 71*(3), 75–88. https://doi.org/10.1509/jmkg.71.3.075
Luo, X. (2009). Quantifying the Long-Term Impact of negative Word of Mouth on Cash Flows and Stock prices. *Marketing Science, 28*(1), 148–165. https://doi.org/10.1287/mksc.1080.0389
Luo, X., Tong, S., Lin, Z., & Zhang, C. (2021). The Impact of Platform Protection Insurance on buyers and Sellers in the Sharing Economy: A Natural Experiment. *Journal of Marketing, 85*(2), 50–69. https://doi.org/10.1177/0022242920962510
Maier, E., & Wieringa, J. (2021). Acquiring customers through online marketplaces? the effect of marketplace sales on sales in a retailer's own channels. *International Journal of Research in Marketing, 38*(2), 311–328. https://doi.org/10.1016/j.ijresmar.2020.09.007
Maxham, J. G., & Netemeyer, R. G. (2002). A Longitudinal Study of Complaining Customers' evaluations of Multiple Service failures and Recovery efforts. *Journal of Marketing, 66*(4), 57–71. https://doi.org/10.1509/jmkg.66.4.57.18512
McAlexander, J. H., Schouten, J. W., & Koenig, H. F. (2002). Building Brand Community. *Journal of Marketing, 66*(1), 38–54. https://doi.org/10.1509/jmkg.66.1.38.18451
McCarthy, D. M., & Oblander, E. S. (2021). Scalable Data Fusion with selection Correction: An Application to Customer Base Analysis. *Marketing Science, 40*(3), 459–480. https://doi.org/10.1287/mksc.2020.1259
Meire, M., Hewett, K., Ballings, M., Kumar, V., & Van Den Poel, D. (2019). The Role of Marketer-Generated Content in Customer Engagement Marketing. *Journal of Marketing, 83*(6), 21–42. https://doi.org/10.1177/0022242919873903
Melzner, J., Bonezzi, A., & Meyvis, T. (2023). Information Disclosure in the Era of Voice Technology. *Journal of Marketing, 87*(4), 491–509. https://doi.org/10.1177/00222429221138286
Meyer-Waarden, L. (2007). The effects of loyalty programs on customer lifetime duration and share of wallet. *Journal of Retailing, 83*(2), 223–236. https://doi.org/10.1016/j.jretai.2007.01.002
Muniz, A. M., & O'Guinn, T. C. (2001). Brand Community. *Journal of Consumer Research, 27*(4), 412–432. https://doi.org/10.1086/319618
Nielsen, I. Q. (2022). April 24). *Social Shopping Is the Future of E-Commerce.* https://nielseniq.com/global/en/insights/education/2022/social-shopping-is-the-future-of-e-commerce/.
Oliver, R. L. (1999). Whence Consumer loyalty? *Journal of Marketing, 63*(4_suppl1), 33–44. https://doi.org/10.1177/00222429990634s105
Pansari, A., & Kumar, V. (2017). Customer engagement: The construct, antecedents, and consequences. *Journal of the Academy of Marketing Science, 45*(3), 294–311. https://doi.org/10.1007/s11747-016-0485-6
Pauwels, K., & Neslin, S. A. (2015). Building with Bricks and Mortar: The Revenue Impact of opening Physical Stores in a Multichannel Environment. *Journal of Retailing, 91*(2), 182–197. https://doi.org/10.1016/j.jretai.2015.02.001
Payne, A., & Frow, P. (2005). A Strategic Framework for Customer Relationship Management. *Journal of Marketing, 69*(4), 167–176. https://doi.org/10.1509/jmkg.2005.69.4.167
Petersen, A., Paulich, B. J., Khodakarami, F., Spyropoulou, S., & Kumar, V. (2022). Customer-based execution strategy in a global digital economy. *International Journal of Research in Marketing, 39*(2), 566–582. https://doi.org/10.1016/j.ijresmar.2021.09.010
Puntoni, S., Reczek, R. W., Giesler, M., & Botti, S. (2021). Consumers and Artificial Intelligence: An Experiential Perspective. *Journal of Marketing, 85*(1), 131–151. https://doi.org/10.1177/0022242920953847
Raff, S., Wentzel, D., & Obwegeser, N. (2020). Smart Products: Conceptual Review, Synthesis, and Research Directions*. *Journal of Product Innovation Management, 37*(5), 379–404. https://doi.org/10.1111/jpim.12544
Ramani, G., & Kumar, V. (2008). Interaction Orientation and firm Performance. *Journal of Marketing, 72*(1), 27–45. https://doi.org/10.1509/jmkg.72.1.027
Reimann, M., Schilke, O., & Thomas, J. S. (2010). Customer relationship management and firm performance: The mediating role of business strategy. *Journal of the Academy of Marketing Science, 38*(3), 326–346. https://doi.org/10.1007/s11747-009-0164-y
Reinartz, W., Krafft, M., & Hoyer, W. D. (2004). The Customer Relationship Management Process: Its Measurement and Impact on Performance. *Journal of Marketing Research, 41*(3), 293–305. https://doi.org/10.1509/jmkr.41.3.293.35991
Reinartz, W., & Kumar, V. (2000). On the Profitability of Long-Life Customers in a Noncontractual setting: An Empirical Investigation and Implications for Marketing. *Journal of Marketing, 64*(4), 17–35. https://doi.org/10.1509/jmkg.64.4.17.18077
Reinartz, W., & Kumar, V. (2003). The Impact of Customer Relationship Characteristics on Profitable Lifetime Duration. *Journal of Marketing, 67*(1), 77–99. https://doi.org/10.1509/jmkg.67.1.77.18589
Reinartz, W., Thomas, J. S., & Kumar, V. (2005). Balancing Acquisition and Retention Resources to Maximize Customer Profitability. *Journal of Marketing, 69*(1), 63–79. https://doi.org/10.1509/jmkg.69.1.63.55511
Reinartz, W., Wiegand, N., & Imschloss, M. (2019). The impact of digital transformation on the retailing value chain. *International Journal of Research in Marketing, 36*(3), 350–366. https://doi.org/10.1016/j.ijresmar.2018.12.002
Rust, R. T., & Huang, M.-H. (2014). The Service Revolution and the Transformation of Marketing Science. *Marketing Science, 33*(2), 206–221. https://doi.org/10.1287/mksc.2013.0836
Ryals, L. (2005). Making Customer Relationship Management Work: The Measurement and Profitable Management of Customer Relationships. *Journal of Marketing, 69*(4), 252–261. https://doi.org/10.1509/jmkg.2005.69.4.252
Schau, H. J., Muñiz, A. M., & Arnould, E. J. (2009). How Brand Community Practices create Value. *Journal of Marketing, 73*(5), 30–51. https://doi.org/10.1509/jmkg.73.5.30

Schauerte, N., Schauerte, R., Becker, M., & Hennig-Thurau, T. (2024). Making new enemies: How suppliers' digital disintermediation strategy shifts consumers' use of incumbent offerings. *Journal of the Academy of Marketing Science, 52*(3), 672–694. https://doi.org/10.1007/s11747-023-00963-1

Schmitt, B. (1999). Experiential Marketing. *Journal of Marketing Management, 15*, 53–67. https://doi.org/10.1362/026725799784870496

Schmitt, P., Skiera, B., & Van Den Bulte, C. (2011). Referral Programs and Customer Value. *Journal of Marketing, 75*(1), 46–59. https://doi.org/10.1509/jm.75.1.46

Shahbaznezhad, H., Dolan, R., & Rashidirad, M. (2021). The Role of Social Media Content Format and Platform in users' Engagement Behavior. *Journal of Interactive Marketing, 53*(1), 47–65. https://doi.org/10.1016/j.intmar.2020.05.001

Speier, C., & Venkatesh, V. (2002). The Hidden Minefields in the Adoption of Sales Force Automation Technologies. *Journal of Marketing, 66*(3), 98–111. https://doi.org/10.1509/jmkg.66.3.98.18510

Srivastava, R. K., Shervani, T. A., & Fahey, L. (1998). Market-based assets and Shareholder Value: A Framework for Analysis. *Journal of Marketing, 62*(1), 2–18. https://doi.org/10.1177/002224299806200102

Statista Market Insights. (2025). *Customer Relationship Management Software - Worldwide.* https://www.statista.com/outlook/tmo/software/enterprise-software/customer-relationship-management-software/worldwide.

Sun, T., Yuan, Z., Li, C., Zhang, K., & Xu, J. (2024). The Value of Personal Data in Internet Commerce: A High-Stakes Field Experiment on Data Regulation Policy. *Management Science, 70*(4), 2645–2660. https://doi.org/10.1287/mnsc.2023.4828

Szymanski, D. M., & Hise, R. T. (2000). E-satisfaction: An initial examination. *Journal of Retailing, 76*(3), 309–322. https://doi.org/10.1016/S0022-4359(00)00035-X

Tax, S. S., Brown, S. W., & Chandrashekaran, M. (1998). Customer evaluations of Service Complaint Experiences: Implications for Relationship Marketing. *Journal of Marketing, 62*(2), 60–76. https://doi.org/10.1177/002224299806200205

Tirunillai, S., & Tellis, G. J. (2014). Extracting Dimensions of Consumer Satisfaction with Quality from Online Chatter: Strategic Brand Analysis of big Data using Latent Dirichlet Allocation. *SSRN Electronic Journal*. https://doi.org/10.2139/ssrn.2408855

Van Doorn, J., Lemon, K. N., Mittal, V., Nass, S., Pick, D., Pirner, P., & Verhoef, P. C. (2010). Customer Engagement Behavior: Theoretical Foundations and Research Directions. *Journal of Service Research, 13*(3), 253–266. https://doi.org/10.1177/1094670510375599

Venkatesan, R., & Kumar, V. (2004). A Customer Lifetime Value Framework for Customer selection and Resource Allocation Strategy. *Journal of Marketing, 68*(4), 106–125. https://doi.org/10.1509/jmkg.68.4.106.42728

Verhoef, P. C. (2003). Understanding the effect of customer relationship management efforts on customer retention and customer share development. *Journal of Marketing, 67*(4), 30–45. https://doi.org/10.1509/jmkg.67.4.30.18685

Verhoef, P. C., Reinartz, W. J., & Krafft, M. (2010). Customer Engagement as a New Perspective in Customer Management. *Journal of Service Research, 13*(3), 247–252. https://doi.org/10.1177/1094670510375461

Viguerie, S. P., Calder, N., & Hindo, B. (2021). *2021 Corporate Longevity Forecast*. *Innosight*. https://www.innosight.com/insight/creative-destruction/.

Wallace, D. W., Giese, J. L., & Johnson, J. L. (2004). Customer retailer loyalty in the context of multiple channel strategies. *Journal of Retailing, 80*(4), 249–263. https://doi.org/10.1016/j.jretai.2004.10.002

Wang, Y., Lewis, M., Cryder, C., & Sprigg, J. (2016). Enduring Effects of Goal Achievement and failure within Customer loyalty Programs: A Large-Scale Field Experiment. *Marketing Science, 35*(4), 565–575. https://doi.org/10.1287/mksc.2015.0966

Wichmann, J. R. K., Wiegand, N., & Reinartz, W. J. (2022). The platformization of brands. *Journal of Marketing, 86*(1), 109–131. https://doi.org/10.1177/00222429211054073

Wolfinbarger, M., & Gilly, M. C. (2003). eTailQ: Dimensionalizing, measuring and predicting etail quality. *Journal of Retailing, 79*(3), 183–198. https://doi.org/10.1016/S0022-4359(03)00034-4

Xiao, L., & Kumar, V. (2021). Robotics for Customer Service: A Useful Complement or an Ultimate Substitute? *Journal of Service Research, 24*(1), 9–29. https://doi.org/10.1177/1094670519878881

Yi, Y., & Jeon, H. (2003). Effects of loyalty Programs on Value perception, program loyalty, and brand loyalty. *Journal of the Academy of Marketing Science, 31*(3), 229–240. https://doi.org/10.1177/0092070303031003002

Yoganarasimhan, H., Barzegary, E., & Pani, A. (2023). Design and Evaluation of Optimal Free Trials. *Management Science, 69*(6), 3220–3240. https://doi.org/10.1287/mnsc.2022.4507

Zeithaml, V. A. (2000). Service Quality, Profitability, and the Economic Worth of Customers: What we know and what we need to Learn. *Journal of the Academy of Marketing Science, 28*(1), 67–85. https://doi.org/10.1177/0092070300281007