

PART II:
**CUSTOMER ENGAGEMENT CONCEPTUALIZATIONS & CONCEPTUAL
RELATIONSHIPS**

Introduction:

The Evolution of Conceptual Work on Customer Engagement

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The Evolution of Conceptual Work on Customer Engagement

Abstract

This introduction briefly reviews some of the highlights in the evolution of conceptual work on customer engagement. It discusses the origins of customer engagement, managerial questions, early academic research, how conceptualizations of customer engagement deepened, the influence of empirical work, how customer engagement is related to other constructs, and some emerging topics in customer engagement. The goal is to provide a foundation for readers to appreciate how the conceptual papers in this book extend our theoretical understanding of customer engagement.

Key Words: Service, Relationship, Experience, Customer Engagement

I am delighted to write an introduction to these six conceptual papers on customer engagement. Customer engagement is a relatively new topic in marketing, but conceptual work has advanced very rapidly over the past 15 years. In this article, I will briefly review some of the highlights in the evolution of conceptual work on customer engagement. I offer my perspective on the origins of customer engagement, managerial questions, early conceptual work, how conceptualizations of customer engagement deepened, the influence of empirical work, how customer engagement is related to other constructs, and some emerging topics in customer engagement. My goal is to provide a foundation for readers to appreciate how the current papers extend our theoretical understanding of this exciting topic.

Origins of Customer Engagement Research

The term “customer engagement” emerged when businesses were changing very rapidly to utilize the new capabilities of the Internet. Marketers were struggling to manage an expanded and complex marketing mix that included new media, including social media, and new technologies. Interestingly, the new emphasis on customer engagement (CE) primarily came from marketing practitioners, not marketing academics – although some academics were sensitive to this shift (Stewart and Pavlou 2002; Sawhney, Verona, and Prandelli 2005; Baumöl et al. 2016). In retrospect, many marketing academics associated CE with the distinctive capabilities of the Internet as a platform for enhanced reach, interactivity, and speed – although some associated it (more broadly) with co-creation activities in a network or ecosystem (Prahalad and Ramaswamy 2004).

By 2006, firms – including consultancies – were using the term to describe the myriad of connections among brands and customers. From its infancy, managers emphasized that –although the focal object or “target” was the customer-brand connection– customer connections and

participation took place within a context characterized by rich media and social elements. In 2007, CE took on a new urgency when a global survey documented that: “companies in every region, in every sector, and across a wide range of market capitalizations, share a conviction that cultivating a high level of CE is now a key strategic challenge” (*Economist Intelligence Unit, 2007, Part 2, p.2*). About this time, articles on topics related to CE began appearing (sporadically, at first) in almost every academic marketing journal.

I first became interested in CE at about this time. While I was serving as Executive Director, the Marketing Science Institute (MSI) conducted in-depth interviews with our corporate members to identify research priorities for 2010-2012. The MSI’s criteria for selecting its priorities included: (1) importance to marketers and the potential to affect business decisions, (2) need for more research-based knowledge, (3) potential for powerful theoretical work that would be broadly generalizable, and (4) ability to benefit from the MSI’s capabilities in fostering collaboration between practitioners and academics. Strikingly, executives working in both business-to-business (B2B) and business-to-consumer (B2C) markets identified CE as a high priority.

The MSI identified CE as a key priority under the broader topic of understanding customer behavior. MSI’s *2010-12 Research Priorities* observed: “Real-time, granular information about customers’ search, social, consumption, and purchase behavior provides opportunities for firms to customize or co-create products, communications, and prices for individual customers at specific points in time” (MSI 2010). The report reflected an emerging academic definition of CE (Van Doorn et al. 2010), stating: “We consider CE to be customers’ behavioral manifestation toward a brand or firm *beyond purchase*, which results from motivational drivers including: word-of mouth (WoM) activity, recommendations, customer-to-customer interactions, blogging, writing reviews,

and so forth.” It also noted that many firms saw CE as a route for creating, building, and enhancing customer-firm relationships and (ultimately) improving business performance.

Managerial Questions

The MSI identified many research questions connected to CE and (more generally) evolving customer behavior. It is useful to summarize them here because they provide insights into why member firms supported conceptual and empirical work on this topic – as well as insights into the evolution of academic research.

- How should firms utilize information about customers’ preferences and engagement behavior (including data from “addressable” social and mobile media) to enhance strategic planning, market segmentation, and targeting?
- Under what conditions can firms use engagement programs to build customer loyalty?
- What are effective ways to integrate the factors that influence customer preference and purchase, including need states, motivations, cognitive and emotional responses, conscious and non-conscious processes, self-regulatory behavior, and social identities (in B2C markets), and buying processes (in B2B markets)?
- How do product, channel, relational, and market characteristics moderate the effects of customer-to-customer interactions on customer purchase behavior? How do these change over time?
- How to build predictive models that leverage “real time” behavioral and contextual data to successfully develop and execute marketing strategies.
- How can firms assess the economic value of CE programs?

As these questions illustrate, marketers' interest in this topic was part of a broader interest in the customer experience and customer journey. Moreover, firms were looking for ways to allocate resources and influence customers along the entire path to purchase.

Academic Research Thrives

A key event in the evolution of CE research was a Thought Leadership Conference that took place in Montabaur, Germany in September 2009. Manfred Krafft (University of Munster), Werner Reinartz (University of Cologne), and Peter VerHoef (University of Groningen) hosted the conference, which was entitled "Managing the Interface between Firms and Customers" (the MSI also supported it). The conference was the third of a series of biannual events that brought together marketing academics and practitioners to explore customer management issues.

The conference produced a Special Issue of the *Journal of Service Research (JSR)* in 2010. In their introduction, Verhoef, Reinartz and Krafft (2010) highlighted the rapid increase in published work dedicated to customer management. They also explicitly noted that CE research focused on non-transactional behaviors – that is, behaviors beyond purchase – whereas research on customer lifetime value and customer equity research had focused primarily on purchase behaviors (p. 248). Later, other authors had a similar perspective (Vivek, Beatty and Morgan 2012). The papers in this issue of *JSR* provided a solid foundation for work over the past decade, so it is useful to review their key ideas.

- CE behaviors are non-purchase behaviors such as WOM activity, recommendations, helping other customers, blogging, writing reviews, and legal action (Van Doorn et al. 2010). This paper developed a conceptual framework of their antecedents and consequences, systematically considering customer, firm, and context-based variables.

- Customer-to-customer (C2C) interactions occur via social networking sites, blogs, wikis, recommendation sites, online and offline communities. Observational learning can be as important as WOM, and group influences can be as important as individual influences. Moreover, there are social system issues (e.g., roles, governance of communities) and context issues arising from product, channel, relational and market characteristics (Libai et al. 2010).
- Customers rely on information from independent and (often) very different channels (e.g., B2C versus C2C interactions), which engenders an increased demand for a seamless experience throughout the customer journey (Van Bruggen et al. 2010).
- CE is also a form of co-creation that can transform B2C activities, such as customer participation in the new product development process and its outcomes (Hoyer et al. 2010).
- There are new ways for firms to leverage new media to successfully manage CE interactions, via search and shopping bots, mobile technologies, recommendation systems, online communities, peer-to-peer networks, and online auctions (Hennig-Thurau et al. 2010). They require the measurement of customer and firm activities and outcomes to assess effectiveness.
- Predictive models and analytics that link customers' engagement to their purchase behavior typically distinguish among different stages: customer acquisition, customer development, and customer retention. However, there are barriers to their practical implementation, including how to apply sophisticated analytics to big data, questions of data ownership, usability or results, integration within company processes, and questions about where data tools should reside within the organization or its network (Bijmolt et al. 2010).
- Better frameworks are needed to evaluate customer influence and referral value and (ultimately) link them to revenues, customer equity and business performance (Kumar et al.

2010). These frameworks will require new metrics at the individual and collective level, encompassing behavioral and attitudinal measures.

Verhoef, Reinartz and Krafft (2010, p. 249) illustrated how these papers tackled different components of a conceptual model linking CE behaviors to (ultimately) firm value.

Deeper Conceptualizations

Often, there is a time lag between when an important, new research area emerges and when published articles address it. For example, although the “dotcom revolution” took place in the 1990’s, there were few leading journal articles about marketing in computer-mediated environments during that period. A notable exception is Hoffman and Novak’s (1996) landmark article – other leading journal articles followed a decade later (Bart et al. 2005; Villanueva, Yoo and Hanssens 2008). Surprisingly, conceptual work on CE proceeded much more rapidly (Hollebeek et al. 2016).

A year after the special issue, *JSR* published Brodie, Hollebeek, Jurić, and Ilić’s (2011) paper entitled: "Customer engagement: Conceptual domain, fundamental propositions, and implications for research." Four commentaries accompanied the article (Bolton 2011; Libai 2011; Malthouse and Calder 2011; Van Doorn 2011). This article viewed CE as “a psychological state, which occurs by virtue of interactive customer experiences with a focal agent/object within specific service relationships” (p. 252). It emphasized that CE was a multidimensional concept that entailed a dynamic process, occurring under a specific set of conditions and within a nomological network of service relationships. This article was (and is) heavily cited and its conceptualization was very influential. However, individual papers have typically investigated some, but not all, aspects of this conceptualization. For example, a paper might study CE’s multidimensional nature, but ignore its dynamic nature over time (or vice versa).

Brodie et al.'s (2011) article appeared shortly after an important and widely cited article on service research priorities (Ostrom et al. 2010). One of the ten priorities was “enhancing the service experience through co-creation.” I contributed the overview of this priority (p. 24), which enumerated five key issues about co-creating service experiences that required research, reproduced below.

1. Managing the customer experience across complex and diverse offerings, touchpoints and customers,
2. Defining the customer role and develop methods for motivating customer contributions to enhance service success and loyalty,
3. Driving customer/service collaboration through technology,
4. Creating, managing and measuring the impact and returns of customer communities and
5. Determining the intellectual property rights to and the pricing of co-created services.

It is noteworthy that all these issues (directly or indirectly) relate to CE – with the customer playing a proactive role in different ways. In addition, another service research priority, “leveraging technology to advance service,” emphasized collaboration and other CE themes. Ostrom et al.'s (2010) article was very influential and gave an added impetus to research on CE. In 2015, a new research team generated 12 service research priorities that carried forward many of these themes (Ostrom et al. 2015).

Influence of Empirical Work on Conceptual Work

Empirical work on CE grew contemporaneously with conceptual work. Brodie et al.'s (2011) conceptualization of CE can be applied equally well in physical, digital or social environments. However, it is not a coincidence that many CE behaviors –such as search behavior, observational learning (i.e., imitation) and WOM– are much more readily observable online than

offline. The *Journal of Interactive Marketing (JIM)* played a key role in stimulating conceptual and empirical work on CE (e.g., Calder, Malthouse, and Schaedel 2009). Given a new title in 1997, *JIM*'s editors increased the breadth and depth of the journal's coverage of issues in electronic, interactive, and direct marketing environments (Malthouse and Hofacker 2010). *JIM* extended the forum for work on these topics beyond what other marketing journals could offer.

Many papers focused on specific online activities –such as social networking (e.g., Facebook, Twitter), product reviews (e.g., Yelp, FourSquare), video-sharing (e.g., YouTube, Hulu), brand or user communities, responses to new media, online search and buying– rather than (more broadly) on CE. An ongoing challenge for CE research is that there are a myriad of CE metrics and analytics (Bijmolt et al. 2010; Peters et al. 2013). Since the conceptualization of CE emphasizes that it occurs under a specific set of conditions and within a nomological network of service relationships, different CE metrics are relevant in different contexts. For example, a scale has been introduced that is useful for social media (Hollebeek, Glynn and Brodie 2014); it emphasizes consumers' self-brand connection and brand usage intent (Naidoo and Hollebeek 2016).

Empirical findings about CE were very important in spurring further conceptual work on CE topics, including interactive services (Berry et al. 2010; Bolton and Saxena-Iyer 2009) and customers' responses to mobile marketing (Shankar and Balasubramanian 2009; Shankar et al. 2010). Conceptual work, in turn, stimulated further empirical work (e.g., Wunderlich, Wangenheim, and Bitner 2013). Through this iterative process of knowledge generation, CE became part of a broader conversation about the role of marketing and customer behavior. All marketing journal articles published between 1995 and 2014 increasingly focused on value

propositions and value cocreation (rather than persuasion) and on customers' mental, experiential, and social well-being (Cho, Fu, and Wu 2017; Hollebeek et al. 2016).

Customer Engagement and Related Constructs

When a new construct is introduced to the literature, it is always important to consider it as part of a nomological net with other important constructs. In this way, researchers can explore theoretical connections, as well as their similarities and differences. The conceptualization of CE is connected to the conceptualization of other important marketing constructs, namely, the customer experience and brand engagement. Both constructs reminded marketers (if they had forgotten) that firms were interested in customers' activities when the brand or firm was the target.

First, as the conceptualization of CE was evolving, the terms "customer experience" (CX) and the customer journey became important topics in marketing. These constructs grew out of early writings about the "experience economy (Pine and Gilmore 1998) and the "service experience" (e.g., Hui and Bateson 1991). Both seem to have originated in marketing practice and migrated to the academia. The CX is usually considered to include the customers' cognitive, emotional, social, sensory and value responses to the organization's offerings over time, including pre- and post-consumption (Kranzbühler, Kleijnen, Morgan, and Teerling 2017; Lemon and Verhoef 2016; Voorhees et al. 2017).

Since it incorporated customers' multi-dimensional responses over time, CX and the purchase journey explicitly recognized the role of CE as a dynamic process connected (ultimately) to customer purchases. In retailing, the term brought together customers' responses in a multi- or omni-channel retailing environment (Verhoef et al. 2009) which could be characterized as a servicescape. Bitner's (1992) research on the servicescape emphasized that customers' responses

were holistic and incorporated their cognitive, emotional and physiological responses to their physical surroundings (which included people, signs, symbols, etc.) Researchers have argued that these many “small details” of customer experiences have powerful effects on customer and business outcomes (Bolton et al. 2014). Today, researchers are exploring customer experiences at the intersection of physical, digital and social realms (Bolton et al. 2018).

Brand engagement is the second construct that has emerged to complement conceptual work on CE (Sprott, Czellar, and Spangenberg 2009). Brand engagement emphasizes the personal connection between the brand and the customer in a way that CE does not. For example, an important stream of research within CE has focused on C2C interactions where the brand or firm may be the target yet (at the same time) peripheral rather than central. In contrast, brand engagement focuses on the customer’s emotional attachment to the brand and its relation to his/her social identity, as well as his/her cognitions and preference for the brand.

Emerging Topics in Customer Engagement

As the preceding discussion has demonstrated, conceptual work on CE has broadened and deepened over the past 15 years. The articles in this section extend this research stream in interesting ways. The first three articles take a deep dive into a single dimension of CE and model it in a context-rich way.

- Schweiger et al. focus on the physical environment. Specifically, they consider five atmospheric elements that influence CE: visual, auditory, olfactory, tactile and taste elements. They explore how sensory responses can take different routes to influence WOM and purchase behavior.
- Hammedi and Leclercq focus on the digital environment. Specifically, they describe how games are a mechanism for creating CE and making co-creation enjoyable and compelling – as well

as helping achieving customers and firms achieve their goals. They define gamification and identify the opportunities and challenges of using games to engage customers.

- Weiger, Hammerschmidt and Scholdra focus on the social environment. Specifically, they investigate how marketer-generated content, disseminated through social media, influence CE behaviors. They distinguish among informative, entertaining and promotional content and explore how they influence productive CE behavior (e.g., tweets and retweets) and consumptive CE behavior (e.g., following a brand on Twitter or “liking” a brand on Facebook).

A major challenge of CE arises from its multidimensional, context-rich nature (Hollebeek, Srivastava, and Chen 2019). Very little is known about how to create “seamless” experiences in which activities are congruent with the customer context. The last two articles explore how marketers can create experiences that are aesthetically pleasing, thematically coherent and effective in building customer-organization connections.

- Dessart and Pitardi explore how a multiplicity of interactions and activities can be connected through storytelling to create CE. They provide a conceptual framework for understanding how a narrative structure connects experiential elements to build favorable associations, relevance and uniqueness that can ultimately influence purchase decisions and behavior.
- Hollebeek et al. examine how consumers with differing personality traits engage with brands. The chapter establishes a conceptual link between consumers’ Big Five personality traits and their engagement with brands, thereby exploring personality-based CE. Based on a review, the authors conceptualize personality-based engagement styles and develop a set of propositions around this new concept.

- Chandler integrates literature on practices, engagement and service systems to provide a holistic perspective on technological actors. While each of these topics has a rich and interdisciplinary theoretical foundation, their links remain subject to scant investigation to date. The author proposes that the integration of these literature streams can help scholars and theorists clarify contemporary phenomena that have emerged because of new roles played by technological actors in society.

I hope you will enjoy exploring the frontier of CE research in these six chapters that center on CE Conceptualization and Conceptual Relationships. As I write, artificial intelligence, the Internet of Things, robots, smart products, collaborative platforms, and other advances in technology are transforming customer behavior (Benoit et al. 2017; Bolton 2019). Marketers and service researchers will be challenged to develop the capabilities and resources to leverage technology in ways that co-create favorable outcomes for organizations, individuals and society. There is much more conceptual work on customer engagement to be done!

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