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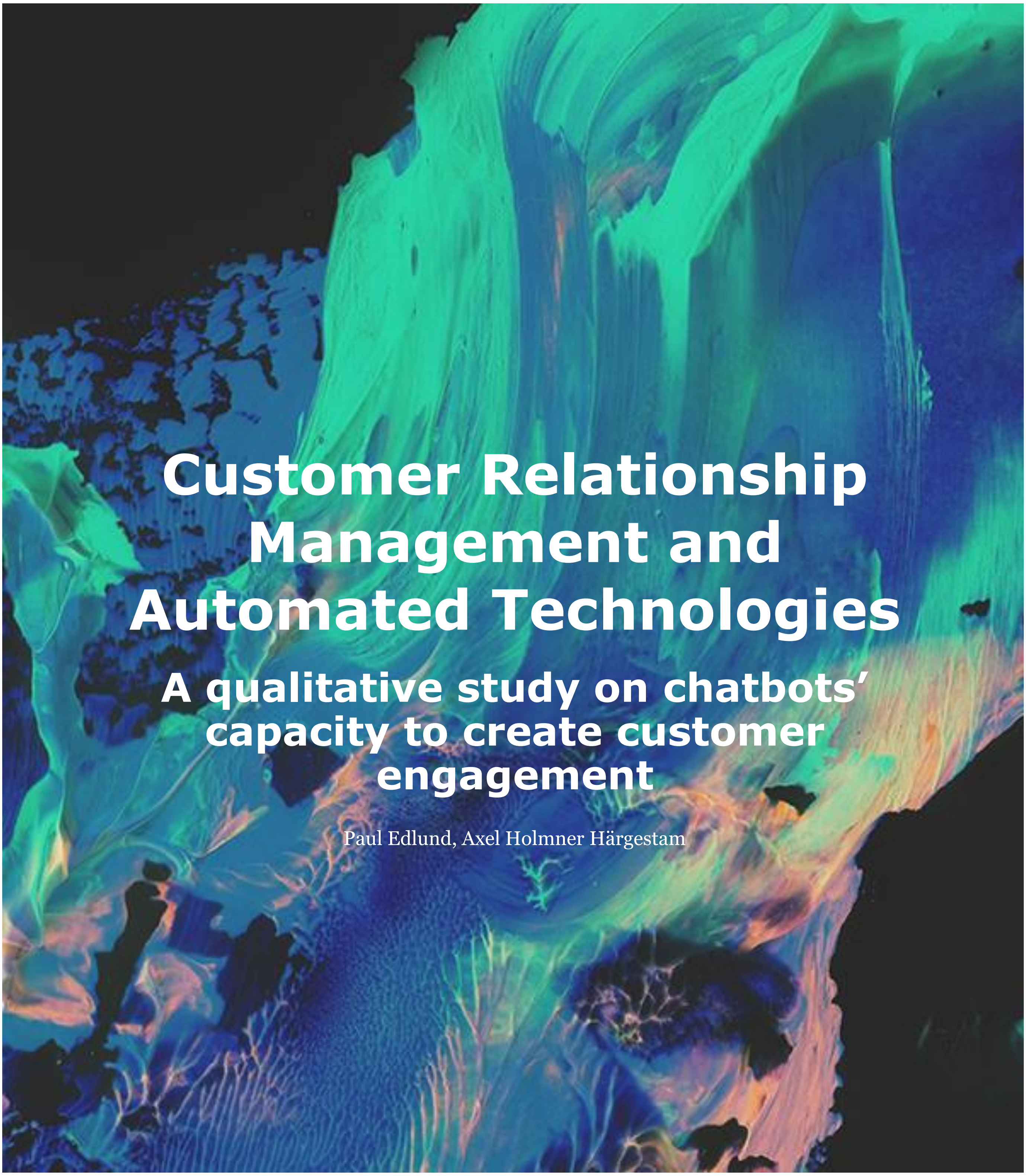

Customer Relationship Management and Automated Technologies

A qualitative study on chatbots' capacity to create customer engagement

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Abstract

The digital age has brought many new technologies that are disrupting the way that companies interact with customers. Automated technologies are one aspect of technological development in recent days, and it has changed how regular business operations are performed. Chatbots, for instance, has changed the way that customers interact with companies. Facilitating interaction and being available around the clock to serve customers who have questions.

This study investigated how automated technologies are used in CRM-activities of companies and how the implementation of such technologies can lead to customer engagement. CRM, Customer Relationship Management, is a core business strategy that aims to strengthen customer relationships through co-creating value with the use of supporting technologies. Customer engagement is a measurement of a customer's involvement with a firm over time, with the end goal of customers becoming “fans” that advocate and generate word-of-mouth for the firm. This study investigates how companies utilize automated technologies in CRM-activities and if these technologies can help lead to customer engagement. The study aims to answer the following research question:

How are automated technologies, more specifically chatbots, used in existing CRM strategies to further create customer engagement?

The study conducted investigates these technologies within five companies that utilize chatbot-technologies from chatbot-providers. The chatbot-providers are also part of the study to get a more comprehensive view of the functionalities and purpose of these technologies. The contrasting view of companies and chatbot-providers is used to answer the sub-purposes of the thesis regarding how companies implement automated technologies.

A qualitative study with interviews was conducted, along with secondary data from written documentary sources. The data were analyzed in a theoretical thematic analysis in which themes were developed from the theoretical framework. The findings of the study show that despite the potential of automated technologies, the most prominent use is for customer service operations. The potential for automated technologies in CRM is greater than what was found in the interviewed companies. The findings also demonstrate that automated technologies facilitate connection, interaction, and increases customer satisfaction, which can lead to customer engagement. The findings also show that there is a discrepancy in the views of companies who use chatbots in their business processes and the chatbot-providers that help implement them.

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1. Introduction

This thesis will begin with a brief motivation on why this chosen topic has been selected for this thesis. Then the background to the case will be presented as well as the theoretical field of marketing and surrounding theories which will be of importance. The chapter ends with a research question being introduced joined with the purpose, and sub-purposes, of the thesis. The last part will discuss how this paper intends to answer the research question.

1.1 Choice of Subject

A buzzword that is often thrown around in today's digital marketing world is Conversational Marketing (Wastell, 2018; Drift, 2020c; Collins, 2020; Whisbi, 2020). This concept is about mainly three things, according to Wastell (2018); it is about starting real conversations with people, finding the right words and language when talking to customers, and automating conversations through AI services. A more comprehensive definition of Conversational Marketing is defined by Iyer (2014, p. 13) as a tool that helps to build and sustain personalized dialogues between customers and brands, across every marketing channel to increase revenue and marketing effectiveness.

The reason for the interest in this topic was because of a local start-up company in Umeå, Sweden, which specializes in digital marketing platforms for businesses. This company, Zlingit, uses non-traditional ways to help businesses to understand their customer base and to increase their customer engagement, as well as automating customer relations. One method they use for digital marketing platforms is chatbots which they incorporate through Facebook Messenger (T. Gruffman, personal communication, April 20, 2020). It was very clear that this matter was something that both the authors felt was quite interesting and very current with what can be seen in today's digital marketing. The use of different digital platforms combined with a relational approach to customers is in line with what both the authors are feeling is the future of marketing.

A company that has been more established within conversational marketing is Drift. This company was founded in 2015 and uses a conversational marketing platform with chatbots to help companies to maximize their leads (Drift, 2020a). Their focus is on shortening the response time for customers so that they do not need to wait as long for a reply. According to Drift (2020b), making a customer wait more than five minutes for a response makes you lose that lead forever. It can be argued that this company is at the forefront of conversational marketing.

Sephora, a multinational enterprise, which specializes in personal care and beauty stores, has adopted a two-way conversation. They use a Facebook Messenger chatbot to help potential customers to book makeup appointments and then use geolocation to bring people into their storefront. By implementing this reservation chatbot, an 11% increase in bookings has been made (Gennaro, 2020; Sonsev, 2018).

As mentioned earlier, the concept of conversational marketing is a buzzword that is being used mostly by practitioners. This concept is not as frequently adopted around academics. One concept that can be somewhat linked to conversational marketing is the term social customer relationship management (sCRM), which is a concept that is being used more frequently in the academic world (Choudhury & Harrigan, 2014; Greenberg, 2010; Kotler et al., 2016). Social CRM is in essence the CRM activities of a company that is facilitated by technological platforms to interact with customers to create mutual value through interactions (Greenberg, 2010, p. 414). Both conversational marketing and social CRM are focused on the dialogue between brands and customers through technological platforms.

1.2 Problem Background

The digital age has made it possible to engage with customers in completely new ways. Unique customer touchpoints are being born in this era which is disrupting the traditional ways of customer engagement (Hoong, 2013, p. 2). One of these new ways to communicate with customers is through chatbots. According to Sashi (2012, p. 261), customer engagement is created through interactions with the customer, and in this case, could chatbots be one way of creating customer engagement. Since measuring customer engagement through likes, clicks, comments, and shares benefit brand visibility but are a low threshold for customer engagement (Sashi, 2012, p. 261).

The aspect of using conversations as marketing was brought up by Levine et al. (1999, p. 5-6) when they discuss conversations as potential markets. *The Cluetrain Manifesto* by Levine et al. (1999) proposes 95 theses in which they discuss these markets and their characteristics. The markets of conversations consist of human beings discussing and sharing information, knowledge, and opinions on the Internet, which facilitates these markets (Levine et al., 1999, p. 6). These conversations are unique in a way that corporations are not able to imitate these since corporations mainly communicate with marketing material and mission statements that are perceived as rigid and monotone (Levine et al., 1999, p. 5).

According to a report produced by IBM, businesses spend today around $1.3 trillion on 265 billion customer service calls each year (Reddy, 2017). With chatbot and AI technology implemented into business practices, not only can an increase in customer engagement be seen, but also huge amounts of customer service costs be removed. By using chatbots, the response times will be speeded up, and freeing up agents for more complex tasks is noted (Reddy, 2017). As well, it is predicted by Gartner that by 2025 those customer service organizations that are using AI in their customer engagement platforms will increase operational efficiency by 25% (Manusama et al., 2019).

Furthermore, according to a report by Internet Retailer (2018), there are two megatrends in online retailing: (1) shoppers wanting the human touch when shopping, not only convenience and choice, and (2) retailers and brands needing new ways to engage with consumers online (Internet Retailer, 2018, p. 24). People come to expect the same level of interaction from e-commerce as they do in traditional shopping settings, i.e. at a physical store (Internet Retailer, 2018, p. 4). In this endeavor, chatbots, AI, and process automation can facilitate the shopping experience by assisting customers when they are shopping online. This possibility, with the added benefit of reducing customer service costs, increasing operational efficiency, and increasing customer engagement is a reason why this subject is particularly interesting to study.

1.3 Theoretical Point of Departure and Knowledge Gaps

Digitalization can be seen everywhere in the world, from personal relationships being augmented by social media, to people using support services within e-governments (Rumpe & Gray, 2015). The society is surrounded by this on-going transformation and it encompasses both elements of business and everyday life. From a business perspective, digitalization can be defined as: *"Digitalization is the use of digital technologies to change a business model and provide new revenue"* (Gartner, 2020). Digitalization has led to companies being able to interact with customers in completely new ways. By using technological platforms such as chatbots, companies can streamline and maximize their marketing routines (Bouwman et al., 2017).

Since the creation of the world wide web, an evident shift in the general marketing practices can be seen. From a more traditional perspective to a more relational view, where each customer is becoming more central in marketing practices. Where once the marketing tactics have been quite static and monologue, they have shifted to a more relational view where a dialogue between customers and companies is more apparent.

However, the relational view towards customers is not particularly new in business operations. Customer relationship management is a core organizational practice that has been used for decades by practitioners. The concept of customer relationship management (CRM) is a concept that emerged in the 1990s within the IT community as the use of technology to facilitate customer-based solutions and facilitate sales for a company's products and services (Payne & Frow, 2005, p. 167).

CRM is defined by many different authors in literature, by Shani and Chalasani (1992, p. 44) as: *"an integrated effort to identify, maintain, and build up a network with individual consumers and to continuously strengthen the network for the mutual benefit of both sides, through interactive, individualized and value-added contacts over a long period of time"*. Nowadays, more synthesized definitions of CRM exist, and numerous authors define CRM as a core strategic organizational process that aims to create value to customers and shareholders by creating and maintaining a profitable relationship with customers through collaborative processes, to identify new customers, queries about product usage, developing marketing programs, and building trust with the customer base, all through the use of data and information technology (Srivastava et al., 1999, p. 169-170; Buttle & Maklan, 2019, p. 25; Parvatiyar & Sheth, 2001, p. 5; Payne & Frow, 2005, p. 168).

Multiple authors argue that CRM frameworks are important; Bibiano et al. (2007) explains that by using CRM systems, companies can obtain loyal and satisfied customers as well as improved business practices which results in better financial performance. By using technology, companies can implement a CRM strategy that has the goal of driving customer engagement by using a relational perspective, instead of a traditional marketing perspective (Constantin & Simona, 2008, p. 757). While technology has made it easier to talk with customers, companies still face new problems. The new era of consumers is more demanding, more conversant, and are especially looking for tailor-made experiences (Iyer, 2014, p. 11).

According to authors Buttle and Maklan (2019, p. 7), some aspects of CRM can be automated through technologies to facilitate certain organizational processes. These processes, such as marketing, salesforce, and customer service can be automated through the use of AI and chatbots to increase efficiency while lowering the costs (Buttle & Maklan, 2019, p. 7-8).

Chatbots can, for instance, interact with customers through different platforms, such as companies' websites or even social media such as Messenger to engage with customers (Buttle & Maklan, 2019, p. 9). A chatbot can respond immediately to a customer's inquiry compared to a human that will spend time answering the question. However, the literature today mostly views how chatbots are used within customer service, and there is limited to none research on chatbots used specifically within marketing (Chung et al., 2018; Følstad et al., 2018; Chu et al., 2017). Chatbots could be used as the first contact with customers within marketing, they could, for example, gather email addresses for subscribing to newsletters, they could generate leads by assisting customers with potential information regarding products and services, etc. This paper will foremost focus on the chatbot's potential and capabilities within marketing, and will not go into how the chatbots are built and used from a technological standpoint.

As with the emergence of social media and its interactive nature to create conversations with customers and involve them in the value-generating process, it has created a great interest in the subject of customer engagement (Sashi, 2012, p. 254). In marketing, researchers define customer engagement as a consumer's spontaneous, interactive, and creative behaviors primarily in non-transactional consumer-company exchanges to achieve his or her individual and social purposes (Brodie et al., 2011; van Doorn et al., 2010; Verhoef et al., 2010). Because engaged consumers provide referrals and recommendations for specific products, customer engagement is a key element in firms' strategies on solution development, new product development, and customer retention (Hoyer et al., 2010; Marketing Science Institute [MSI], 2010; Verhoef et al., 2010). The interactive nature of the Internet and social media allows companies to be more involved in discussions online to improve their products and services to be able to create more value for the customer (Sashi, 2012, p. 254).

The previous research on CRM has outlined its utilization of technologies to facilitate operations to implement strategies, gather information about customers, and to create mutual value for customers and company (Srivastava et al., 1999, p. 169-170; Buttle & Maklan, 2019, p. 25; Parvatiyar & Sheth, 2001, p. 5; Payne & Frow, 2005, p. 168). The emergence of new technologies, such as social media has given the rise to new concepts within CRM as social CRM (Choudhury & Harrigan, 2014, p. 149). Social CRM is emphasizing the conversational aspects of CRM and its potential to create customer engagement through social media (Choudhury & Harrigan, 2014, p. 149). With the prevalence of technologies such as chatbots in business today, the subject of automated technologies within CRM is limited to its areas of usage within CRM operations (Buttle & Maklan, 2019, p. 7), and not focused on the aspect of customer engagement. Previous research has focused mostly on the functionality of chatbots and other automated technology and not its potential to create customer engagement, thus the authors have identified a research gap that this thesis intends to explore.

The research on automated technologies in CRM strategies is important since it presents for businesses how they can collect data in real-time about their customer segment and use it to increase their revenues whilst increasing customer engagement. Moreover, automated technologies can also help how companies address their customer complaints promptly (Marolt, et al., 2015).

1.4 Research Question

How are automated technologies, more specifically chatbots, used in existing CRM strategies to further create customer engagement?

1.5 Purpose

The purpose of this thesis is to develop a deeper understanding of how automated technologies are integrated into CRM strategies in today's business context. This paper will also investigate sub-purposes about the different views of companies that use chatbots and companies that implement chatbots for other companies. These sub-purposes are:

1. Potential chatbot usage vs. actual chatbot usage
2. What processes does the chatbot automate vs. what processes could it automate?
3. Effects of implementing chatbot technologies

To fulfill this purpose, interviews will be conducted with companies that have implemented chatbots and chatbot-providers to accomplish a dual perspective on chatbots. Secondary data will also be collected from written documentary sources of chatbot-providers to complement the interviews conducted.

2. Scientific Methodology

This section will explain the philosophical perspectives that this paper will use as a framework when answering the research question and conducting the study. Each paragraph will describe the nature of the philosophical approaches combined with a discussion to explain which perspective has been chosen and why.

2.1 Preconceptions

The knowledge, perceptions, and earlier experiences as people possess will directly reflect on the results of presenting new knowledge. As explained by Weber (2004, p. 6): *"…interpretivists recognize that the knowledge they build reflects their particular goals, culture, experience, history, and so on."*. This is in line with the notion that the authors of this paper have. As well, as argued by Gilje and Gremen (2007), researchers cannot comprehend the world without having any pre-understandings of it. If there are no pre-understandings of the world, different perspectives from different authors cannot be presented and thus knowledge regarding a specific subject will be limited.

Preconceptions can be formed from earlier experiences and these can both harm and aid the study. Preconceptions can harm by not giving a neutral and objective view of certain things. These preconceptions can be minimized by introducing discussions between the authors before each interview so that these assumptions of companies can be as neutral as possible since each author can have different notions and experiences. From the other perspective, these preconceptions can also aid the thesis by capturing different perspectives which else could have been overlooked. As mentioned earlier in the epistemology, this can complement the views of both the interviewee and the authors.

The authors' preconceptions on the subject lie in their thought, opinions, and previous knowledge of the subject. Both authors were introduced to the concept from a mutual acquaintance, that is the CEO of Zlingit. From this contact, the authors have been introduced to the usage of chatbots to boost customer engagement. The interest in the subject is rooted in the authors' interest in digital solutions that can be applied to traditional marketing and other organizational practices. One of the author's opinions on these solutions is somewhat pessimistic, as he believes that however practical and beneficial it sounds in theory, it is something entirely else in practice. This opinion comes from the author's previous thesis-work when he investigated gamification, as the application of that concept in practice was not ideal, hence the more negative preconception of the application of technology to facilitate business processes and activities.

The second author has a more optimistic view, where the notion of technology to alter customer relationships seems like a beneficial strategy. The reasoning behind this notion is that the author has had positive encounters with chatbots before the start of this thesis, as well as being quite close friends with the CEO of Zlingit. By discussing the topic of chatbots and AI beforehand, the author has a favorable perspective on the matter.

This mindset is what drives the interest to investigate this phenomenon in this study, to develop a deeper understanding of how it works and how companies work with this sort of technology.

2.2 Ontology

The ontology describes the view on reality, it concerns the nature of social entities. The central aspect within this perspective is the question of whether the objects can be viewed as neutral and objective bodies that have a detached reality, meaning that they are external to social actors. Or if they can be considered as interlinked, social constructions that are built up from perceptions and actions of social actors. These two central aspects within the ontology are often referred to as *objectivism* and *constructionism* (Bryman & Bell, 2011, p. 20). These both raise questions on the researchers' assumptions; how they think the world operates and their commitment to their particular views (Saunders et al., 2012, p. 110).

For this paper, it is quite clear for the authors that the world operates in a way where all actors and entities are intertwined. The authors believe that the concepts being studied in this thesis are formed by many different actors and therefore is not only a single definition of a concept presented, but instead many definitions are also viewed so that a more comprehensive perspective can be taken. As well, the notion of the concepts being presented here is evidently evolving and will never be constant. The definition of a specific concept today will not be the same a hundred years from now. The knowledge that the authors have today, which is presented, can differ from the knowledge which will be gathered several years from now. As well, the authors argue that there is no definitive reality, but this is only a subjective which is being presented; actors can never be fully external from what is being studied according to the authors.

The ontological perspective, *constructionism*, views that the social phenomena are created from actions and thoughts of social actors (Bryman & Bell, 2011, p. 20). Constructionism can be seen as a continual process, whereas through social interactions, the social phenomena are in constant change (Saunders et al., 2012, p. 111). Bryman and Bell (2011, p. 22) also explain that researchers' thoughts of the social world are constructions made up of them. Meaning that researches always present a specific version of social reality and not a definitive reality.

While the constructionist perspective views actors and actions as intertwined, *objectivism* views social reality as external social actors (Saunders et al., 2012, p. 110). Objectivism describes that social phenomena are external facts that exist independently from social actors. It could be compared to a corporation, where the business itself has a reality that is external from the people who are working within it (Bryman & Bell, 2011, p. 21). The authors believe that the reality is subjective and that each of them has separate views that are colored by the experiences from their past lives, meaning that these experiences will as well color the study in some way. It is therefore chosen that this study will be done with a constructionist approach in mind.

2.3 Epistemology

Companies can differ from one another in their governance and their general strategies when it comes to CRM. Which will give the results of this paper a broad view of how different companies employ different strategies for the same purpose, to manage the customer relationship. The implication is that companies hold different views on CRM and therefore cannot these be generalized. This is in line with the epistemological perspective of interpretivism, that according to Tracy (2013, p. 43), Bryman and Bell (2011, p. 16), and Saunders et al. (2009, p. 116) is subjective and co-created with the participants of the study. As the authors will participate in the interview and not make objective observations, the interpretivist view is most suitable.

Interpretivism is more suited to studies within the social sciences, as the researchers must take into account the behaviors, interpretations and different roles of humans in the situation being studied (Bryman & Bell, 2011, p. 16; Saunders et al., 2009, p. 116) as this study will examine the different views on CRM in companies. The philosophy of epistemology itself concerns what can be deemed as acceptable knowledge in a field of study (Bryman & Bell, 2011, p. 15; Saunders et al., 2009, p. 112).

For this study, as the authors are conducting interviews, it is complicated to be external to the process, as the authors will be conducting the interviews themselves. The implication this will have for the study is that the authors are exposing themselves to injecting their values in the research and hence affecting the participants of the study, thereby altering the data (Saunders et al., 2009, p. 114). However, this should not be seen as a weakness of the study, as the process of collecting data will be co-created with different participants and complementing their views with the views of the authors. This is one consideration that the authors have discussed and have considered when designing the interview guide and interview processes. The authors believe that to study the CRM processes within different organizations and to get rich data to build a better understanding, adopting an interpretivist view is most suitable for this study.

2.4 Research Approach and Strategy

This paper will most probably generate extending theory that will add complexity to the use of automated technologies in a business context. Since the use of chatbot within existing CRM strategies has not been researched that much earlier. An inductive approach will be the most beneficial for this thesis since the authors want to develop further theory within this area of research. An inductive approach is characterized by planning to explore data and to develop theories from that specific data. Subsequently, relating the developed theory to existing literature (Saunders et al., 2009, p. 61). The traditional view on research approaches explained by Hyde (2000), is that when quantitative data is used, for example, numbers and statistics, a deductive research approach is used. Whilst qualitative data, narrative data such as information from interviews, are linked to an inductive approach. Tracy (2013, p. 22) presents that qualitative research can work with both an inductive and a deductive approach. Since the matter at hand is quite a complex area, the use of quantitative data such as numbers will not suffice to cover the complexities and intricacies of automated technologies within CRM.

The approach taken by the authors began with gathering knowledge on the subject at hand, CRM, automation, and chatbots. This was done to ensure that the knowledge regarding the matter was not a limiting factor in the thesis whilst also finding a research gap that sufficed. The perspective of induction will also let the researchers have a more flexible structure depending on if some unexpected changes are becoming clear (Saunders et al., 2009, p. 127). It is crucial that for this study, the data collected from observations is as rich as possible so that different perspectives and contrasting information can be presented and used to build extending theory. For the authors to be able to gather this type of information, interviews will be most beneficial. These interviews will be of the qualitative type since the authors need to gather as much rich data as possible from each interviewee. This is in line with the characteristics of qualitative data according to Bryman and Bell (2011, p. 571-572) and Saunders et al. (2009, p. 480). The data gathered from interviews will be complemented with the collection of secondary data from websites of companies that implement chatbot platforms for other companies, to gather more data about chatbots in practice.

2.5 Literature Search and Choice of Theories

The literature search is important as it lays the foundations that the theoretical framework of this thesis is based on. A proper literature search ensures that the articles, sources, and theories used are up-to-date and relevant when the authors move on to build theory (Saunders et al., 2009, p. 75). According to Saunders et al. (2009, p. 75), the literature search is initiated by setting up parameters to limit the search. For this thesis, the authors established parameters in the form of keywords and search terms; search engines and databases; and lastly, the criteria used to evaluate the credibility of the sources.

Bryman and Bell (2011, p. 118) argue that keywords are used in the literature search to define the research area more clearly and to find the most relevant sources to build the theoretical framework. For this thesis, the keywords developed over time as the authors also developed the research area over time when finding more information through the various sources. These keywords also developed over time as the authors noticed that the language, description, and denomination for different concepts were different from various articles, decades, and between practitioners and academia. The keywords used for this thesis are *conversational marketing, customer relationship management, CRM, social customer relationship management, sCRM, CRM 2.0, customer engagement, conversations, relational marketing, automated technologies, market automation, chatbots*, etc. These keywords have been used in various combinations to firstly, find relevant material for the theoretical framework, and secondly, to get a broader understanding of the subject.

The search engines and databases of this thesis have consisted mostly of searching through the databases available through Umeå University, such as EBSCO Business Source Premier and the Umeå University Library search functions. These databases have also been complemented with the use of Google Scholar for articles not available through the aforementioned sources. The authors have followed research streams through various sources and choosing articles and authors often cited through other sources to find more relevant articles on the subject. This was done to ensure the credibility and relevance of the sources used.

One search criterion the authors used for the literature search was using peer-reviewed sources to the extent that they were available to ensure the quality and credibility of our theoretical background. In the cases when peer-reviewed articles were not available, the authors opted for sources that were cited often in other articles. This was done by following research streams through the peer-reviewed articles that were available. Another criterion used to ensure credibility was using sources from academic journals. In databases such as Google Scholar, the option to only search for peer-reviewed articles is not available, thus the authors chose articles from academic journals to ensure the quality and credibility of the sources. This was done because Internet search engines merely find the sources and do not properly evaluate them (Bryman & Bell, 2011, p. 106).

Another critical aspect that is relevant for collecting and understand the literature used for the study is the knowledge of scrutinizing data thoroughly. The authors need to be sure that the sources being used are reliable and that the quality of them meets relevant criteria. According to Bryman and Bell (2011, p. 545), four criteria can be used to assess literature: *Authenticity, Credibility, Representativeness,* and *Meaning*. The authenticity criterion is used to assess whether or not the literature is genuine and of unquestionable origin. Credibility assures that the literature is error-free and is not distorted. Representativeness views if the results presented in the literature are typical, if not, is it explained why that is the case. Lastly, meaning is concerned with if the information from the sources is evident and comprehensible (Bryman & Bell, 2011, p. 545). To assure that these criteria have been met, the majority of the literature used is from primary sources. In the cases where secondary references have been used, it is due to accessibility concerns, however, secondary sources have been scrutinized by viewing citations from other publications. The literature introduced was also assessed in its recency of publication. This is to ensure that the literature used encompassed newer developments in the field.

As this thesis also includes the collection of secondary data, it needs to be assessed as well. When secondary data has been used, it has been done sparingly, and when deemed reliable. The authors are aware that secondary data used from company websites can be comprised of marketing material, and therefore this type of data has been used sensibly and with caution in mind. When secondary data has been collected directly from company websites, most of the data gathered is based on customer cases and are more of practical information, which is harder to distort, since this type of information must be corroborated by the company. Additionally, when implementing these sources, they have not been solely used to explain, instead, they have complemented the primary information that has been collected. The authors have been aware of the difficulties with secondary data and have had that in mind when using it.

According to Patel and Davidson (2011, p. 43) researchers must make limitations in their literature search to limit the tremendous amount of information in a selected subject. From the literature search, the authors have selected theories and models from literature to capture a broad spectrum of CRM by including different aspects and types of CRM. The authors have compiled a wide range of definitions of CRM from authors such as Kotler and Keller (2009), Shani and Chalasani (1992), Morrel and Philonenko (2001), Srivastava et al. (1999), and Buttle and Maklan (2019). The authors have researched different types and areas of CRM provided by Buttle and Maklan (2019), Reinhold and Alt (2009), Kotler and Keller (2009), Wahlberg et al., (2009), and Kelly (2000).

These authors highlight the different areas in which CRM is important in an organization and which processes it can be used. CRM is a large concept that covers many areas of an organization; thus, the authors have specified different areas that are interesting for the conduction of this study. The areas of CRM that were chosen were social, strategic, operational, analytical, and collaborative CRM. These areas complement each other by covering different aspects of CRM as a whole and weave in the evolution that has happened with the emergence of automated technologies. This was followed by the connection to the automated technology, which is also of value for this study. Buttle and Maklan (2019) highlight automation in three areas, which the authors of this study found support for in literature from Boon et al. (2002), and, Rivers and Dart (1999).

The authors were first introduced to the subject being researched through the concept of "conversational marketing". Through an extensive literature search, the authors concluded that this is a term mostly used by practitioners. However, the literature on sCRM social was included to capture the similarity in focus area it has to conversational marketing. Since it focuses on how companies work with customer relationships through the use of technological platforms (Kotler et al., 2016). The purpose of these concepts is related to the last part of the literature, namely: customer engagement. Sashi (2012) is cited with the customer engagement cycle as a more comprehensive view of customer engagement contrary to the more rudimentary view as viewing customer engagement as simply clicks, likes, and shares on social media. The customer engagement cycle was chosen to include different stages customers go through to become "engaged".

3. Theoretical Framework

This chapter aims to help the reader to understand relevant concepts and models that will be of use for this study. A comprehensive overview of earlier literature within this research is presented. The chapter ends with a summary to ease the understanding of the chapter.

3.1 Customer Relationship Management (CRM)

When Customer Relationship Management (CRM) emerged a few decades ago, it was in the IT-Community, as discussed in a previous chapter. At that time, CRM was mostly concerned with collecting information about customers to facilitate sales of the company, and to exploit this data about customers and potential customers mostly for the firm's benefit (Payne & Frow, 2005, p. 167; Buttle & Maklan, 2019, p. XIX). A more contemporary view of CRM is not only about collecting and managing information about customers through information technology, but it is also a customer-centric organizational process as the name suggests (Buttle & Maklan, 2019, p. XVIII). The focus of CRM is about maintaining and building customer relationships for long-term benefits for both the firm and customer (Buttle & Maklan, 2019; Kotler & Keller, 2009, p 173).

In literature, there are many different definitions of CRM:

Table 1: Definitions of CRM

Authors	**Definition**
Kotler and Keller (2009, p. 173)	*"CRM is the process of carefully managing detailed information about customers and all customer 'touch points' to maximize customer loyalty"*
Shani and Chalasani (1992, p. 44)	*"an integrated effort to identify, maintain, and build up a network with individual consumers and to continuously strengthen the network for the mutual benefit of both sides, through interactive, individualized and value-added contacts over a long period of time"*
Buttle and Maklan (2019, p. 17)	*"CRM is the core business strategy that aims to create and maintain profitable relationships with customers, by designing and delivering superior value propositions. It is grounded on high-quality customer-related data and enabled by information technology"*
Morrel and Philonenko (2001, p.8)	*"CRM is not a technology or even a group of technologies. It is a continually evolving process that requires a shift in attitude away from the traditional business model of focusing internally. CRM is an approach a company takes toward its customers backed up by*

	thoughtful investment in people, technology and business processes"
Srivastava et al. (1999, p. 169)	*"CRM is a process that addresses all aspects of identifying customers, creating customer knowledge, building customer relationships, and shaping their perceptions of the organization and its products."*

These definitions highlight some things about CRM that the authors want to take into further consideration. Namely: (1) CRM is a core business process, (2) it should be focused externally, on the customers, to be able to create value for both parties, (3) CRM is not all about technology, however, it is greatly facilitated by technologies.

According to Paliouras and Siakas (2017, p. 23), there are four stages of implementing a CRM strategy: *interacting, analyzing, learning,* and *planning.* Interacting is the establishment of a dialogue between the customer and the company. This can be a first purchase for the customer that leads to a transaction and further interactions with the company. Analyzing is the second step in which the company evaluates the needs of the customer through marketing practices to offer superior value to the customer. The third step concerns the company learning more about the customers through their behavior and interactions to stimulate further interactions with customers. Lastly, the company engages in planning activities that are personalized according to the needs of the individual customer, based on the previous steps of the CRM strategy. All the interactions with a customer are analyzed and allow the company to learn more about the customer to offer them superior value in future interactions (Paliouras & Sikras, 2017, p. 23). Through these steps, companies are capable of building successful relationships with their customer base and to gather more information about their customers.

CRM is a multi-faceted business process that entails several individual business processes of the company to understand the needs of the customer and to provide good value (Paliouras & Sikras, 2017, p. 23). To further understand the concept of CRM, it can be divided into four areas of the business (Paliouras & Sikras, 2017, p. 23; Buttle & Maklan, 2019, p. 6).

3.1.1 Strategic CRM

"a customer-centric business strategy that aims at winning, developing and keeping profitable customers" (Buttle & Maklan, 2019, p. 6).

Strategic CRM is customer-centric, in that sense, it focuses on allocating resources in the company to an area in which they would give the greatest benefit to customers and increase their value the most (Buttle & Maklan, 2019, p. 6; Paliouras & Sikras, 2017, p. 24). This form of CRM also uses formal systems within the company that can enhance employees' performance and promote behavior that further enhances the customer experience, satisfaction, and retention. This customer-centric view of the strategic CRM is focused on using the information that it collects on customers to create superior value to those customers as their competitive advantage, much like the now contemporary view of CRM discussed previously (Buttle & Maklan, 2019, p. 6-7; Wahlberg et al., 2009, p. 193).

3.1.2 Operational CRM

"focuses on the integration and automation of customer-facing processes such as selling, marketing and customer service" (Buttle & Maklan, 2019, p. 6).

Operational CRM is one aspect of CRM that focuses on integrating technologies in the business to facilitate selling, marketing, and customer service operations to improve the customer engagement and customer experience at the same time as the company makes efficiency gains from automation (Buttle & Maklan, 2019, p. 7-8). Wahlberg et al. (2009, p. 13), explain operational CRM as the different business processes and technologies that can aid in improving the efficiency and accuracy of the everyday routines regarding the customer-faced operations.

In these different areas, the automation technology has different applications, for instance: (1) in marketing applications, automation can help with market optimization, event-based marketing, and campaign management, (2) in salesforce automation, it can aid with account management, lead management, and product configuration queries, and (3) in customer service automation it can help serve with customer communications, service management and issue-management for customers (Buttle & Maklan, 2019, p. 9). These areas of automation are further discussed in section 3.3.

3.1.3 Analytical CRM

"the process through which organizations transform customer-related data into actionable insight for use in either strategic or operational CRM" (Buttle & Maklan, 2019, p. 6).

Analytical CRM is the process that is responsible for handling data, this includes: capturing, storing, extracting, integrating, processing, interpreting, using and reporting data about the customer that is then used to enhance value for both customer and company (Buttle & Maklan, 2019, p. 13; Kotler & Keller, 2009, p. 182-183). This customer-related information tracks the different kinds of interactions with the company and generates data based on purchase history, payment history, responses to marketing campaigns, and service data (Buttle & Maklan, 2019, p. 13). The analytical CRM collects and develops insights about customers that are later used in the strategic and operational CRM aspects by compiling data that can solve customer problems and enhance value to customers (Buttle & Maklan, 2019, p. 13-14; Kelly, 2000, p. 262).

3.1.4 Collaborative CRM

The concept of Collaborative CRM can, in general, be explained as a collaboration between several value chain actors to achieve more customer benefits and to improve these relationships (Reinhold & Alt, 2009, p. 98). Collaborative CRM focuses on the components and processes that make the firm able to communicate and collaborate with its customers. Types of processes could be voice technologies, web-store fronts, conferencing, email, face-to-face interaction (Iriana & Buttle, 2005, p. 1). Through the development of all these different ICT (information communication technology) channels, the fourth type of CRM was created (Wahlberg et al., 2009, p. 193-194).

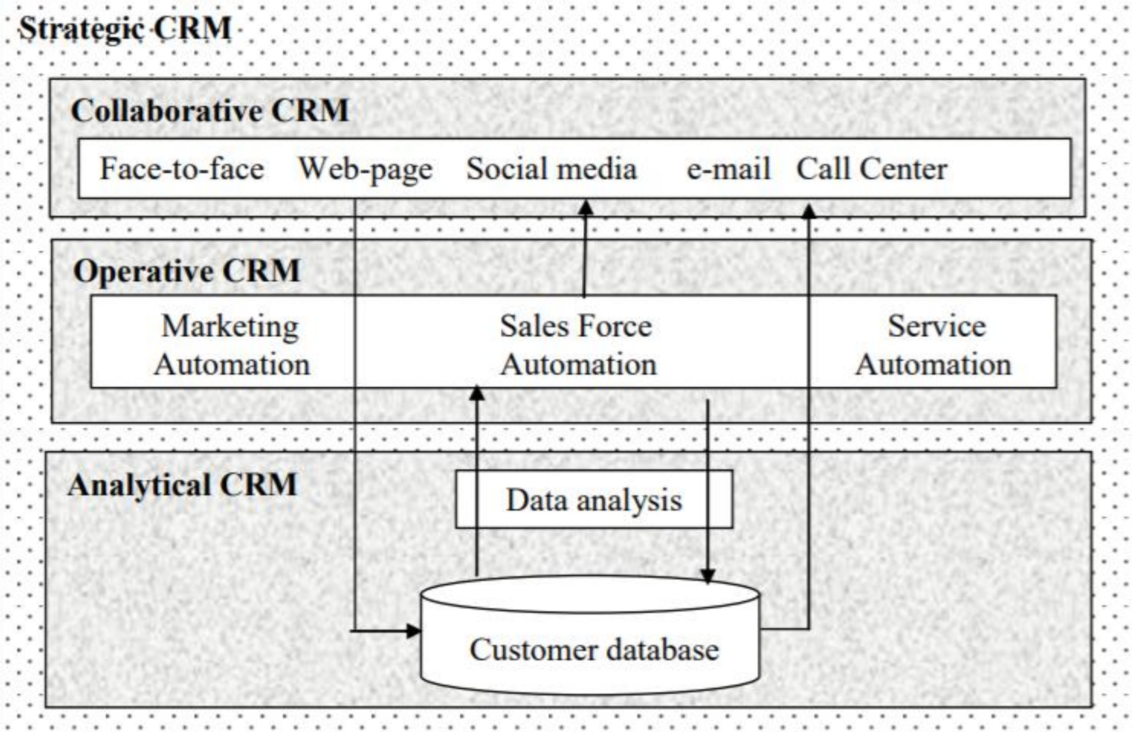

Figure 1: Relationship between strategic, operational, analytical, and collaborative CRM Source: Paliouras & Siakas, (2017, p. 23)

3.2 Social CRM

According to Reinartz et al. (2004), the impact technology has had on CRM, has led to many perceiving this concept as predominantly a technological initiative, ignoring the marketing principles that are underlying the general concept. Since earlier technologies have not been considered in relation to CRM, the concept of social CRM was only mentioned in the early 2000s (Choudhury & Harrigan, 2014, p. 151). Greenberg (2010, p. 414) defines it as: "*. . . a philosophy and a business strategy, supported by a system and a technology, designed to engage the customer in a collaborative interaction that provides mutually beneficial value in a trusted and transparent business environment.".* This definition adds to the traditional view of the CRM concept but elaborates it by adding the social aspect (the interactions, functions, processes, and capabilities between companies and customers) (Greenberg, 2010). As also explained by Zablah et al. (2004), this definition indicates that there are technological tools that can aid in facilitating interaction with customers and to further enhance the customer relationship and performance. Another definition which extends the notion of Greenberg's (2010) social CRM (sCRM): *"Social CRM is a philosophy and a business strategy, supported by a technology platform, business rules, workflow, processes and social characteristics, designed to engage the customer in a collaborative conversation in order to provide mutually beneficial value in a trusted and transparent business environment"* (Myron 2010, p. 28). This new era makes it easier to share content and build conversations that will have higher engagement from the customers. This will lead to deeper and more meaningful relationships with potential customers, prospects, and even partners (Rodriguez et al., 2012, p. 367). It is crucial to note that since this concept focuses mostly on social media, it is the two-way interaction, conversational aspect, and the customer relationship that will be of value for this paper.

3.3 Automation

The emergence of new digital technologies, through digitalization, has led to companies using new technologies to automate business processes. Automation has become a prevalent tool in today's business landscape. It has a plethora of uses in industry and production (Bahrin et al., 2016), logistics and supply-chain (Dadzie et al., 1999), and organizational business processes (Buttle & Maklan, 2019). Buttle and Maklan (2019) highlight three areas within operational CRM, which were briefly mentioned in a previous section, in which automation technology plays a role to facilitate business processes:

3.3.1 Market Automation

According to Boon et al. (2002, p. 86), market automation is defined as: *"Market automation is the automation of information systems-based tools and techniques to allow marketing departments to better identify and target customers, more importantly segments of the market"*. Buttle and Maklan (2019, p. 9) discuss the usage of market automation in market optimization purposes, marketing campaign management, and event-based marketing. The event-based marketing, for instance, helps companies with messaging brand content and offers at a particular point-in-time at contextual conditions, such as holidays, and consumer behavior, such as purchasing behavior. When it comes to customer retention, the event-based triggers also function with automated technology. If a customer calls a company about price inquiries, it might indicate that the customer is considering changing the provider of a service. In this case, an automated offer to the customer in an effort to retain the customer. The automated technologies track the customer behavior to create greater value for that specific customer and also track the buying behavior of that customer during their customer life cycle to make the best efforts for retention (Buttle & Maklan, 2019, p. 9).

3.3.2 Salesforce Automation

Authors Rivers and Dart (1999, p. 59-60), define salesforce automation as the process of using software and technological applications to convert manual sales activities into electronic processes to reduce the time spent on support activities. This definition is from the late '90s and not relevant to the level of technology used today. Buttle and Maklan (2019, p. 10) provides a more comprehensive view of what salesforce automation can be used for, namely: lead generation, lead qualification, nurturing leads, discovering needs, developing value propositions, negotiating, and closing a sale. The evolution of salesforce automation has moved from reducing the time spent on support activities to handling actual selling activities to reduce costs and increase the efficiency of these activities.

With the usage of data in an organization through analytical CRM (which is discussed further down in this section), the company collects data about customers to create customer profiles that help the automated selling with creating the right offer for the right customer (Buttle & Maklan, 2019, p. 10).

3.3.3 Service Automation

Through service automation, companies can rely on technology to handle customer service matters (Buttle & Maklan, 2019, p. 11). Therefore, can service automation bring tools and techniques that will help the organization, in the sales and marketing area, to communicate with customers. Examples of these can be call centers, web sites, e-commerce interfaces, and more sophisticated ICT technologies (Boon et al., 2002, p. 86). In companies today, the use of interactive voice responses (IVR) is used to handle incoming calls and routing them to the most appropriate agent at the company.

Further, the use of chatbots is also to handle frequently asked questions (FAQ) and other complaints are used to reduce service costs, increase service quality, increase response time, and enhancing the customer experience. Chatbots can be preferred over responding to complaints on social media, as complaints can be answered in real-time, and the usage of social media brings an increased risk of complaints and customer conversations being unanswered (Buttle & Maklan, 2019, p. 11-12).

3.4 Chatbots

Self check-in kiosks at airports, robotic pool cleaners in swimming pools, and chatbots are all examples of automation tools that companies use to transform the ways they create and deliver services (Ivanov, 2019, p. 1). The advances in IT and artificial intelligence have allowed companies to decrease costs, reduce waste, increase productivity and efficiency, and streamline operations (Agrawal et al., 2018; Davenport, 2018; Talwar et al., 2017). Chatbots are becoming increasingly integrated into companies and the performance is ever improving with chatbots being able to hold conversations with the customer and resolve complaints (Buttle & Maklan, 2019, p. 11-12). A chatbot is a computer program that can communicate with a human with a natural language (Shawar & Atwell, 2007, p. 29). Whilst Michiels (2017, p. 74) stated that chatbots are created to be able to provide service anytime, anywhere. While chatbots can give responses directly to people, they can also make it possible to book appointments with company staff (Drift, 2020). The purpose of chatbots today is to simulate human-like conversations (Carter & Knol, 2019, p. 113). Chatbots integrate language models and different algorithms to be able to talk to humans with an informal language that is more natural to people (Shawar & Atwell, 2007, p. 29). According to Michiels (2017, p. 71), there are two different types of chatbots:

- Chatbots that are designed for specific purposes of a business: These chatbots can be found in messaging apps such as Facebook Messenger, WhatsApp, WeChat, etc. For instance, flowers from your local flower shop could be ordered through a chatbot on one of these messaging apps.
- Chatbots that are designed to help with multiple needs and a variety of information. These are also called chatbot platforms or virtual assistants. Examples of virtual assistants could be Apple’s Siri, Google Assistant, Amazon Alexa, and Microsoft Cortana.

Areas in commerce where these chatbots are becoming an essential part of customer experience are customer service, mobile apps, messaging channels, robots, etc. Within customer service, an example of chatbot integration could be into an e-commerce site where the chatbot automatically responds to customer’s most frequently asked questions. In mobile apps, as explained, they could be integrated into already existing chat apps. Robots could even be empowered with natural language understanding and employing conversational means (Michiels, 2017, p. 72). With the popularity of chatbots increasing, AI has been implemented into chatbots on various platforms so that chatbots have become smarter and better at understanding customer questions and replying to these, thus increasing their performance in processes such as market, salesforce, and customer service automation. Leading to chatbots becoming more evident in online communication with companies (Hill et al., 2015; Hu et al., 2017).

3.5 Customer Engagement Cycle

According to Sashi (2012, p. 260), customer engagement should focus on satisfying customers by delivering value which is superior to competitors' value and to build trust and commitment over a long-term perspective with customers. However, Buttle and Maklan (2019, p. 196) see customer engagement as the customer's level of involvement with a firm over time. Both of the authors stress the long-term commitment. The proposed customer engagement cycle by Sashi (2012) explains the process of building customer engagement for a company. In this model, the customer goes through seven phases: connection, interaction, satisfaction, retention, commitment, advocacy, and lastly, engagement (Sashi, 2012, p. 260).

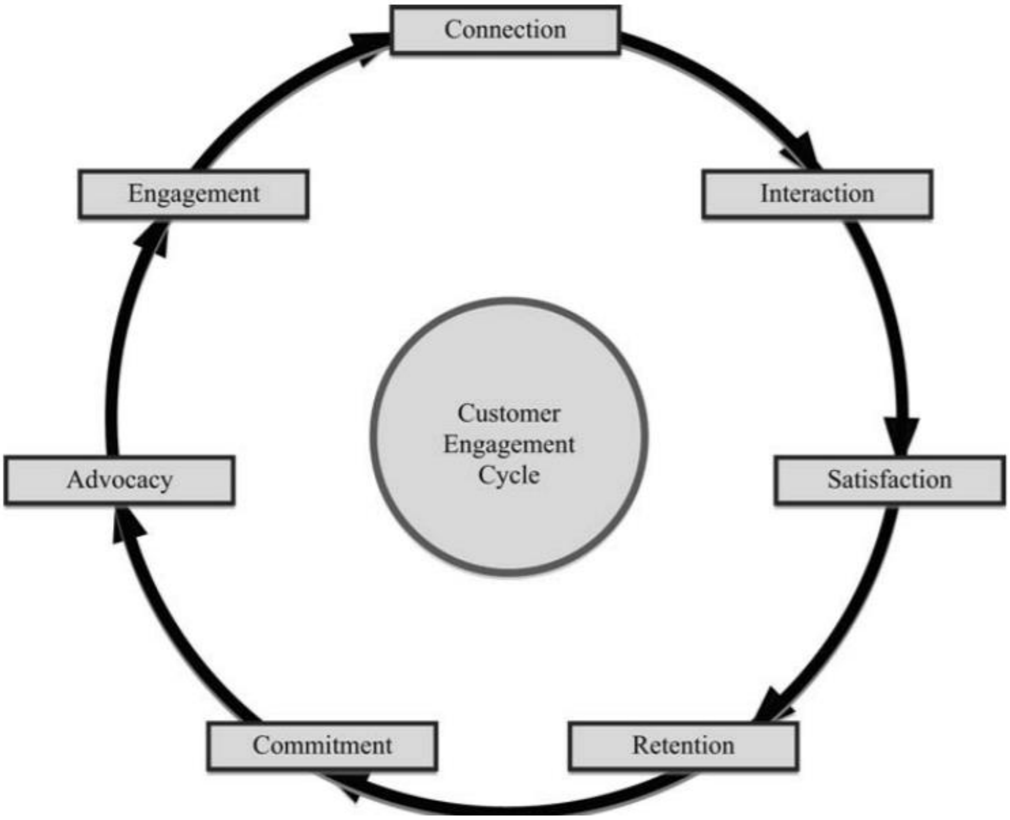

Figure 2: Customer Engagement Cycle. Source: Sashi (2012, p. 261)

1. **Connection**: The prerequisite for creating customer engagement is to first connect with potential customers. These connections can be made both through traditional offline methods, but also through digital technologies, such as chatbots (Sashi, 2012, p. 260). The use of social media for companies has enabled them to be able to connect with a larger number of customers on a plethora of different platforms, facilitating the potential to create a larger customer-base (Sashi, 2012, p. 261). This can be in favor of companies that are using chatbots on social media platforms such as Messenger. It could be noted that it is both the customers and the companies that may need to search for connections.
2. **Interaction**: When customers are connected with the company, they can start their interaction (Sashi, 2012, p. 261). This interaction can be initiated by both the customer and the seller, as customers can reach out with complaints and inquiries, and sellers can follow up on leads and visitors on platforms (Sashi, 2012, p. 261-262).

The social media aspect also allows the company to tap into conversations on platforms where their customers are discussing their product and acquiring knowledge to be able to give value to those customers (Sashi, 2012, p. 262). This would also be beneficial for companies, since then could companies integrate chatbots that would be able to assist customers. Texting, instant messaging, blogging, social networking, and especially chatbots are tools that enable more frequent, richer, and faster ways of interacting with customers and potential customers. By interacting more frequently with customers, companies can collect more data regarding customer needs (Tikkanen et al., 2009).

3. **Satisfaction**: If the customer is satisfied with the aforementioned interaction, it will create satisfaction and a more loyal customer and make them more likely to stay connected with the company. Satisfaction is crucial to create customer engagement; however, it is not enough with just customer satisfaction as it does not guarantee repurchase from the customer (Mittal & Kamakura, 2001). It can in that way be linked that for a customer to be satisfied from the interaction with a chatbot, it must be able to help the customer in a way that pleases the outcome, either by being able to answer the customer inquiry directly or by escalating it to the correct personnel.
4. **Retention**: Customer retention is a possible outcome of customer satisfaction and overall positive feelings towards a brand that can lead to an enduring and long-term customer-seller relationship. However, this long-term relationship does not need to be the result of an emotional bond to a company (Sashi, 2012, p. 262-263). A study by Gustafsson et al. (2005; cited by Sashi, 2012, p. 263) shows that customer satisfaction has a positive effect on customer retention.
5. **Commitment**: When it comes to a customer's commitment to a company or brand, there are two dimensions presented by Gustafsson et al. (2005; cited by Sashi, 2012, p. 263) namely: calculative and affective. Calculative commitment is related to the rationale behind choices, such as costs and availability, while affective is more in tune with the emotions behind a commitment (Sashi, 2012, p. 263). The two dimensions can lead to different types of behavior from the customers. While general commitment is a sum of both dimensions, calculative commitment leads to enduring relationships with the brand and higher customer loyalty, while affective commitment leads to a more trusting relationship with a stronger emotional bond (Sashi, 2012, p. 263).
6. **Advocacy**: When a customer is satisfied, or even delighted, with a brand, company, or product they can express those feelings to others, to advocate their experiences and connection with the brand (Sashi, 2012, p. 263). In the connected world today, people advocate on social media for their experiences and engage in word-of-mouth communication about the brand. A study by Harrison-Walker (2001; cited in Sashi, 2012, p. 263) the author suggests that loyal customers are less likely to express brand advocacy, however, customers with a strong emotional relationship to a brand are more likely to do so.
7. **Engagement**: If a customer is both satisfied with the brand and feels a degree of brand loyalty, the customer is more engaged with the brand (Sashi, 2012, p. 264). Both effective and calculative commitment are prerequisites for customer engagement, as it requires both a strong bond and a superior value for the customer (Sashi, 2012, p. 264). When a customer is engaged, they become advocates and can create new interested potential customers for the brand through word-of-mouth and technological platforms, such as social media (Sashi, 2012, p. 264).

3.6 Summary of Chapter

During this chapter, several concepts have been presented. However, there are some concepts and frameworks which are of value to remember for the later sections of this study. The key takeaway of this chapter is that CRM is a broad concept and can be divided into different types for a specific purpose, namely: strategic, operational, analytical, and collaborative CRM-activities. CRM has evolved with the use of technology and how people interact with companies, this has led to the emerging of the concept of social CRM. Companies utilize automated technologies to facilitate business operations, to reduce costs, increase efficiency, and to serve the customer better. In operational CRM, three key areas are outlined: market, salesforce, and service automation. Chatbots can be of use for many different purposes, and they stimulate human-like conversation to induce a relational approach to customers. Customer engagement is one goal that companies strive towards when implementing marketing and CRM strategies. Customer engagement can be seen as a journey that measures the customer's engagement with a firm over time, as demonstrated by the Customer Engagement Cycle by Sashi (2012).

4. Practical Methodology

This section will present what kind of data will be gathered for the study so that the research question and purpose can be answered. As well, the method for conducting the interview together with an interview guide will be discussed. What kind of sample and arguments for designing the questions will be shown, and lastly, the method of analyzing the interviews will be presented.

4.1 Data Collection Method

As mentioned earlier in the research approach and strategy, for the authors to collect as relevant data as possible for this study, primary data from interviews and secondary data from company websites will be used. The primary data will be the main source of empirical data; however, it will be complemented with secondary documentary data from the organization's websites.

The primary data will convey the perspectives of the companies being presented and the development of a deeper understanding of how companies work with CRM in practice. During interviews, the way the company and its employee thinks about CRM will be presented too, which is of most value for this paper. Primary data can be explained as information that has been specifically gathered for the study at hand. It is originally collected information, which has been gathered from for example interviews, questionnaires, experiments, etc. This kind of primary data has not been gathered for any other case than answering the proposed research question and purpose (Saunders et al., 2009, p. 69, 74). By producing primary data, new data is added to the existing database of knowledge within this area (Hox & Boeije, 2005, p. 593). However, secondary sources are not always information that has been specifically gathered for another research purpose, it can also be internal records, annual reports, or other publications (Collis & Hussey, 2014, p. 59). From this discussion, it is quite clear that primary data from interviews will be the main source of data.

The reason for the choice of interviews is since it will be most beneficial to gather rich and in-depth information, along with complementary data on the organizations' websites. The interviews will allow the authors to get nuanced answers, opinions, and perspectives on the subjects that are being investigated. This type of data is called qualitative data. Qualitative data generates non-numerical data, or also called nominal form (Collis & Hussey, 2014; Saunders et al., 2009, p. 151). This type of data can be gathered through interviews, focus groups, secondary data, etc. (Saunders et al., 2009, p. 138). Instead, if quantitative data would have been gathered, it would have led to data being in the numerical form, questionnaires are one-way quantitative data can be gathered (Saunders et al., 2009, p. 151. This type of data is seldom rich compared to nominal data being collected through a qualitative approach (Collis & Hussey, 2014).

When collecting qualitative data from interviews, there are several ways the interviews can be conducted (Saunders et al., 2009; Tracy, 2013; Bryman & Bell, 2011). For the authors to be able to collect as much data as possible for the study and still being able to answer the research question and the several purposes, a semi-structured interview will be the most beneficial. By using a semi-structured interview, the authors will be able to have central questions regarding the theme of the paper but also letting the interviewee add more to the already existing questions simultaneously as the interviewer can ask follow-up questions to the structured questions. According to Bryman and Bell (2011, p. 205), semi-structured interviews can also vary the sequence of the questions if needed.

As mentioned, the researchers will have a list of themes and questions to be discussed. But depending on the particular interview, these questions can be omitted or altered for the specific business context (Saunders et al., 2009, p. 320-321). This less structured method should use an interview guide which is meant to stimulate discussion and not dictate it (Tracy, 2013, p. 139).

When using a structured method for interviews, questions are being asked out exactly as they are written and there is little room for discussion (Saunders et al., 2009, p. 320). By not letting a discussion present itself, much potential information that can be of importance is being lost. Therefore, is this a reason too why not this method is chosen. Questions are often very specific and offer the interviewee a fixed range of answers (Bryman & Bell, 2011, p. 202). By using the specific questions, or also closed-ended questions, much nuance is omitted from the interviewee that can be of value for the research. The unstructured approach is as well not beneficial for this paper since it allows the interviewee to talk without any limitations and the only thing the researchers have is loose topics that should be addressed. The interviewer takes the role of a listener and a reflector instead of probing questions (Tracy, 2013, p. 139). This type of interview is very informal, and the type of data being collected is necessarily not beneficial for the thesis. As well, the authors argue that when multiple interviews are going to be held, it is more advantageous that a semi-structured script exists that can be a guide during the interview.

The secondary data collected in this study is used to compare and contrast the primary data collected through interviews. Secondary data can be put in the context of the primary data to strengthen the findings in the primary data collection (Saunders et al., 2009, p. 269). In this study, secondary data was collected through the organization's websites to compare the data collected through interviews. The organizations in question are companies that implement chatbots-platforms for other companies: Vergic, GetJenny, Drift, and Ebbot. These companies were contacted for a potential interview, however as they declined, the authors have resorted to collecting secondary data to complement the data gathered from interviews. The data collected was related to the companies' chatbots, how they function, and what business process they can be implemented. This data was readily available on their websites along with cases of companies they have collaborated with.

4.2 Sampling Choice

According to Tracy (2013, p. 138) and Lapan (2003, p. 242), the determinant of the best suitable sample, and where to find the appropriate data, for a qualitative study is the research and purpose of the study itself. In other words, the sample of the study must be relevant for the purpose of the research. This sampling method is called purposive sampling (Tracy, 2013, p. 134; Bryman & Bell, 2011, p. 442; Saunders et al., 2009, p. 237), which means that the researchers select the sample that best fits the parameters of the study. The goal of this sampling method is to sample participants, or companies in this case, strategically, so that the sample is relevant to the research question being asked (Bryman & Bell, 2011, p. 442). Although a purposive sample is not a random sample, it is not either a convenience sample (Bryman & Bell, 2011, p. 442). Since the authors had specific research goals in mind and not using a sample by ease, it is evidently a purposive sample. A suggestion for qualitative studies by Lapan et al., (2012, p. 83) is to have several study populations in order to investigate different perspectives. For this study, one study population is the companies that work with CRM and utilizes chatbots to improve these processes, and the other being companies that implement chatbots for other companies.

Study population 1

The primary interest of this study was to find companies that are working with chatbots, to get the perspective of companies that use these kinds of technologies. This study population is more focused on how chatbots are used, how they are integrated, and what the impact of these technologies is. Since this was the primary focus, it was understood that businesses needed to be found by contacting them directly, which was done with a mail template (see Appendix 3). However, whilst contacting companies directly was the primary focus, a LinkedIn post was as well posted by the authors to increase the reachability to companies (see Appendix 4). When reaching out to companies, it is evident that the companies that use these concepts are more likely to be selected than others.

To find the best suitable sample for this study population, the authors established criteria on which to evaluate the sample. To find the best suitable sample, it is suggested by Tracy (2013, p. 138) that the researchers can establish a set of criteria to evaluate the relevance of the study. Two sets of criteria were selected for two different reasons. The first set of criteria is for suitable and relevant companies for the researchers to contact. The criteria for these companies were: (1) the company utilizes chatbots in their organization, (2) the company works with CRM. The other set of criteria was for the participants of the study, the people who work at the relevant companies. The criteria for these people were: (1) the person works with CRM or is familiar with how the company works with CRM, and (2) the person works with chatbots or is familiar with how the company utilizes chatbots. These criteria allow the researchers to select companies and participants that are relevant for this study. The criteria for the participants were evaluated by the authors through discussions about the purpose of the thesis before scheduling an interview, to ensure that the person in question fulfilled the criteria and was suitable for the study.

When looking for companies that fit the criteria, several Swedish companies' websites were accessed. These companies were chosen since the authors had before encountered chatbots on similar companies in these industries. On their websites, chatbots or similar AI platforms were searched for. If a company would have a chatbot on its website, the company was contacted for further and a potential interview. If the company's website did not have a chatbot, the company was not selected, and the next company was addressed. Moreover, this type of searching for companies who fit the criteria was quite cumbersome, and therefore another strategy was used too. By investigating business ventures who created these chatbot platforms for companies, user cases could be found. In other words, the creators of the chatbot technologies' websites had several user cases where their affiliation with companies who used their chatbot tools was listed. These businesses were Ebbot, Vergic, GetJenny, and Leadoo. Through their user cases, the authors got more leads to pursue a possible interview. In the case that a company from their user cases was chosen, it was mentioned in the email that the authors know of their chatbots through their work with the aforementioned company. Through these user cases, more companies who used chatbots on their websites could be found and contacted. The reason for this was so that specific contact information to each company with whom they had an affiliation with could be gathered. Companies were contacted via email or telephone. Emails were sent to the company if there was an email address to specific employees available on the company website, for instance, a marketing manager.

In the emails, the authors included a brief presentation of the reason for the email, the purpose of the study, a request for a potential interview, and a request to forward our email to relevant employees if possible. To find out if the people contacted were suitable for the study, the authors supplied relevant information when reaching out to companies and asked to be redirected to a person that might know more about this subject. A few times, the authors were redirected several times before finding the right person for the sample, and sometimes the contacted person declined an interview. When email addresses were not available, the authors contacted the main office of the company via telephone and asked to be redirected to people working with either chatbot, marketing, or CRM. In some cases, the authors were provided with an email address or a phone number to relevant employees where the authors explained the reason for the contact as discussed previously.

Study Population 2

The second study population is included in this study to complement the view of the companies by providing the view of the chatbot-provider. This view is more focused on what chatbots can offer companies in terms of CRM and customer engagement, and the intended purpose and usage of these technologies. The companies that make up the second study population are Zlingit, Leadoo, Vergic, Drift, Ebbot, and GetJenny. These companies provide automated solutions in the form of chatbots with different purposes such as customer service, salesforce, and marketing. To get a comprehensive view of the usage of chatbots and automated technology, the different kinds of chatbots are of great value for this study.

The aforementioned search for companies that utilized chatbots led the authors to websites for companies that create chatbot platforms for companies. These companies were contacted for a potential interview, while at the same time searching through the user cases that these chatbot-providers had on their website. By contacting chatbot providers that have worked with companies in the other study population, it could provide a more comprehensive view of one company’s specific case if it were provided by a chatbot-provider that was interviewed.

In total from both study populations, 27 companies were contacted to ask if they wanted to participate in this study. This sample consisted of Swedish, Norwegian, Finnish, German, and U.S companies. From these 27 companies, seven companies participated in interviews, five declined to participate, and the rest did not answer. From the seven companies who participated, five companies were in the first study population and two were in the second study population.

4.3 Interview Guide

The chosen interview type for this study was semi-structured interviews. This choice has some implications when designing the interview guide. According to Bryman and Bell (2011, p. 473), the interview guide is created around general concepts and areas in which the interview guide will serve as an outline. The different areas covered in the interview guide are drawn from the theoretical framework, so the interview guide covers the different types of CRM, automation, and chatbots. Some concepts are more investigated directly than others, such as automation and chatbots, as they are more central to the purpose of this research. Other types of CRM in businesses are touched upon more indirectly through the interview guide.

By creating an interview with an outline instead of a strict script, the interviewers can utilize the flexibility of the semi-structured interview and adapt the interview to the situation and the participant (Tracy, 2013, p. 143). Questions in the interview guide are designed with follow-up questions in mind and to evoke follow-up questions during the interview. In semi-structured interviews, the interviewers can adapt to the situation if a particular answer evokes a new follow-up question that the interviewers did not explicitly include in the interview guide. This flexibility also allows the interviewers to not ask redundant questions if the interviewee already answered another question that appears later in the interview guide.

The interview guides were not sent out to the participants beforehand, however, in one case it was requested by one participant to get the interview guide beforehand. Providing the participant with the material beforehand is a source of credibility, validity, and reliability of the data according to Saunders et al. (2009, p. 328), as it allows the interviewee to prepare relevant information for the interview. However, the choice to not provide material for the participants is to ensure that the participant is speaking freely and not preparing their answers beforehand and to ensure that any preconceptions of the authors are not affecting the participants through the provided material.

As mentioned in section 4.3, this paper is investigating two separate study populations. To consider the sampling choice for the data collection method, this study employs two different interview guides to accommodate for the difference in the study populations.

Interview Guide 1

The first interview guide is intended for companies that utilize chatbots and automated technologies in their business operations. Therefore, were the questions more focused on the company's work with CRM, chatbots, etc., and to see the measurable results of these implications. The interview guide for this study is designed with a particular set of topics in mind, which are brought up in the theoretical framework. The topics will address questions regarding that specific topic and delve deeper into it to create a deeper understanding of how the company works with this particular topic.

During the opening part of the interview, the interviewees are further informed of the voluntary participation and consent is re-addressed, as well as the participant's permission to record the interview. In the interview guide, the opening questions are mostly regarding the participant and their position at the company as well as their job duties and experiences with the company. These questions were intended to set the tone for the interview with some formal questions regarding their job at their respective company.

The opening section was followed up with the questions regarding the subjects that the authors were investigating. These questions are meant to open up a discussion about the companies' work with for instance CRM and chatbots. In this endeavor, the questions were generally open-ended to allow the participant to answer freely. These kinds of questions are generative questions, which according to Tracy (2013, p. 147) also serve the purpose to generate more topics of discussion in the answers of the interviewee. For the interview guide, the authors have chosen to utilize these types of questions to allow the participant to answer freely to gain a broad understanding and to further probe for more specific questions.

For some topics, the authors were looking for more specific answers that, contrary to the generative questions, would not open up for further discussions and the discovery of new topics for discussion. This requires more direct questions that are close-ended, which are called directive questions (Tracy, 2013, p. 149). For this study, the directive questions are focused on the usage of chatbots and automated technology, and how the effect of such technologies can be seen in their CRM work. The directive questions are as mentioned more close-ended which would elicit a more specific response from the interviewee. Directive questions can be threatening and difficult to answer (Tracy, 2013, p. 149), however by building rapport and trust with the interviewee, this should not constitute a significant problem.

At the end of the interview, the authors attempted to sum up the interview with closing questions in an attempt to address the big picture of the interview and tie up loose ends. This was done with closing questions that ask the interviewee for additional remarks or an inquiry about things that may have been missed during the interview. The closing section of the interview also includes the authors' gratitude towards the participant of the study for their participation, although not explicitly expressed in the interview guide.

Interview Guide 2

The second interview guide is designed for gathering information about how the chatbot-providers view these technologies, their practice areas of usage, and their intended purpose. The questions for this interview guide included similar sections as the previous interview guide regarding opening and closing questions. However, the more generative and directive questions were modified.

The purpose of the interview with chatbot-providers was to open up for more discussion about how the chatbots they implement function: what they are capable of and what kind of measurable impact that they might have for a business that implements them. In this endeavor, the questions for this interview guide were mainly generative and open-ended to generate more topics to ask the companies about. These kinds of questions paired with the semi-structured interviews allowed for more nuanced and rich data to emerge from the interviews.

Directive questions were utilized to find out specifics about what the chatbots can provide companies and how the implementation of chatbots can impact the work with customer relations. These questions would also probe the intended results for the chatbots and what they are capable of, instead of only relying on the data collected from the other study population.

4.4 Conducting the Interviews

Interviews are conversations with a clear purpose and a structure, in which people exchange thoughts, views, and ideas (Kvale & Brinkmann, 2009, p. 2; Tracy, 2013, p. 131). The purpose and structure have implications on the “conversation” as it can be difficult for it to feel natural and casual in the way of a normal conversation. For this reason, the authors established a semi-structured interview to make the conversation feel more natural by establishing themes to talk around and allow some flexibility in the interview. Conducting an interview can be challenging, as the interviewer has to follow the structure, have considerations for time constraints and never inject opinions, while at the same time being friendly and establishing trust (Denzin & Lincoln, 1994, p. 364). To accomplish this task, the interviewers dedicated time before the interview to make small-talk and discuss the interview before the interview itself.

This allowed the interviewers to establish trust and set a more friendly and casual tone for the interview beforehand so the interview could be dedicated more to the purpose of the interview. The interviews conducted were scheduled for an hour, however, the interviews did not require the full hour. This was done to allow both the interviewee and interviewers to feel more relaxed during the interview while managing to cover all the questions prepared for the interview. When scheduling the interviews, the authors offered the participant to select the time for the interview, as the authors had a flexible schedule and were willing to adapt.

An interview can be conducted face-to-face, telephone, or Internet-mediated means (Bryman & Bell, 2011, p. 206). The interviews themselves were conducted in a mix of settings, however, most interviews were conducted through Internet-mediated means. This was due to the current situation with the COVID-19 pandemic and the fact that some participants were located at different places far from where the authors are situated. The different types of interviews have different advantages and disadvantages. Face-to-face interviews have the advantage of the interviewers being able to more rich data through both verbal and non-verbal communication (Tracy, 2013, p. 160; Bryman & Bell, 2011, p. 206). Face-to-face interviews also allow the interviewers to establish rapport, build trust, and set a tone for the interviews more easily. For this study, one interview was conducted face-to-face. The reason for this was convenience, as the authors and the participant were located close in proximity to each other in the city. The rest of the interviews were conducted via Internet-mediated means, i.e., Skype, Zoom, Microsoft Teams, and Google Meet. The advantage of Internet-mediated interviews is that they give easy access to interviews without having to rendezvous in person and conduct the interview face-to-face (Saunders et al., 2009, p. 349; Bryman & Bell, 2011, p. 206). The Internet-mediated interview-platforms have the added functionality of being able to record the interview through the platform. The authors also recorded the interviews on recording-apps on smart-phones to secure back-up in case anything would happen to a recorded file. Due to the current situation with COVID-19, time constraints, and cost, the Internet-mediated interviews were the best possible option for this study.

Table 1 shows the duration of each interview and how they were conducted.

Table 2: Table of Interviews

Interviewee	**Industry**	**Duration**	**Conducted**	**Work Role**
Zlingit	Chatbot-providers	18:50 min	Face-to-face (Umeå)	CEO
Company 1	Transportation	27:42 min	Internet-mediated (Microsoft Teams)	Strategy & Innovation
Company 2	Finance and Banking	16:09 min	Internet-mediated (Zoom)	Customer Service
Company 3	Energy	37:23 min	Internet-mediated (Zoom)	Digital Business Development

Company 4	Energy	50:02 min	Internet-mediated (Zoom)	CRM Specialist
Leadoo	Chatbot-providers	17:55 min	Internet-mediated (Google Meet)	Country Manager
Company 5	Unemployment fund	16:05 min	Internet-mediated (Zoom)	Digital Communication

4.5 Transcribing and Processing

Transcribing is the process of transforming the recorded audio from interviews into manageable and usable data (Tracy, 2013, p. 177; Bryman & Bell, 2011, p. 482; Saunders et al., 2009, p. 485). The process of transcribing can be a very time-consuming task, however, it is very important as it is the transcribed data that will be used for the results, analysis, and conclusion of the study. The interviews conducted were recorded with the expressed consent from the participants. To process the interviews and transcribe the data, the authors of this study have utilized transcription software to facilitate this process and to handle time constraints. The software transcribes the data in rough drafts and the authors have then corrected the mistakes made in the software by listening to the interviews and going over the transcription. The lacking sound-quality of the Internet-mediated platforms did not pose a problem for the transcription of the interviews.

The data that was extracted from the transcription is presented in the form of quotes from the interviews regarding each question and concept that was dealt with. This is to compare and contrast the answers to the different companies concerning the same topic. The quotes extracted from the transcribed interviews are selected to only present the relevant data and to present it concisely. During the interviews, some interviewees gave us very elaborate answers to questions. However, not all of the information from one question was relevant to the question itself, thus select quotes and relevant information was extracted from the interview-questions. This is to ensure that only relevant data is analyzed and used to base our conclusions on.

The secondary data is presented along with the data from the interviews to juxtapose the answers to the same topics from the perspective of the chatbot-provider. The data from the secondary sources did not generate usable quotes, as the raw data from the interviews, but rather in the form of marketing material as it was present from their websites. Therefore, in some cases, the data from the secondary sources have been written into a descriptive text instead of being quoted. The sources from all the secondary data are included in the reference-section under a specific sub-section labeled “Secondary Data References”. As with the primary data, only the most relevant data has been chosen from the secondary sources to ensure that the conclusion is based on only relevant data.

4.6 Analysis Method

After the interviews have been conducted and transcribed, the data from the interviews must be analyzed. In order to answer the research question, a logical analysis method is needed. One that is clear and presents the data logically. For the authors to be able to compare the gathered data with the theory to understand the results, a framework that is easy to use is needed. Alsaawi (2014, p. 153) argues that analyzing the data gathered from interviews can be a quite complex process since the data collected can be quite rich and hard to interpret. It is therefore crucial that the said strategy to analyze is logical in structure. According to Robson and McCartan (2016, p. 476), a thematic approach to coding is the most used analytical tool. Thematic analysis is a flexible approach to qualitative data that is analyzed by identifying patterns within the data (Braun & Clarke, 2006, p. 77, 79). A thematic coding analysis is a qualitative analysis which has a generic approach, it can either be used as a realist or as a constructionist approach. In this case, a realist method will be used. Which will examine the way experiences, beliefs, meanings, and the reality of participants are seen. The coding aspect highlights the most interesting information and labeling it and then put it into a specific theme (Seidman, 2006, p. 125). This framework can be divided into five stages (Robson & McCartan, 2016, p. 469-476; Braun & Clarke, 2006, p. 87):

1. Familiarizing yourself with the data.
2. Generating the initial codes.
3. Identifying themes.
4. Constructing thematic networks.
5. Integration and interpretation.

Familiarizing yourself with the data can be done through reading and re-reading your transcribed data, noting down ideas, and trying to understand the entirety of the text. In the case of this study, the authors re-read the transcribed material several times to get a complete grasp of the entirety of the material. Generating initial codes can be done through creating a framework, or the process of finding the most basic segment of data and organizing it. For this step, the authors made internal comments within the material to highlight the most important parts of the transcriptions. Identifying themes may be done by combining several segments of data into themes. This part was done by comparing each of the interviews with each other to find segments that were closely related in each transcription. By doing this, themes could be identified and grouped so that the most relevant data became easy to combine. Then could a collection of the data relevant to each theme be done. Constructing thematic networks means developing a map of the analysis. Fitting all the themes together into a wholesome picture. Lastly, integration and interpretation, trying to fit the data together and understanding what the data are telling you (Robson & McCartan, 2016, p. 469). This step made it easier for the authors to perceive similarities and differences in data, which then made it possible for them to write about the empirical findings.

The thematic approach has been explained as the most beneficial approach for analyzing the recorded data, however, to explain further the choice, a short description of theoretical thematic analysis will follow. Theoretical thematic analysis is based on predetermined themes and possible theory. These preliminary themes are found before the interviews have been analyzed, and then the final themes are created based on the results (Langemar, 2008). These preliminary themes, or topics, which are found beforehand, are based on the theories that the authors have thought to be relevant for the interviews.

The preliminary themes that were found beforehand were: CRM, sCRM, Social Media, Chatbots, Customer Engagement. After analyzing the material from the interviews, the preliminary themes were then reduced to final themes: CRM, Chatbots, Customer Engagement. As well, two themes were added to the final themes: Automation and Personalization. The reason for this was since the interviews gave beneficial data regarding these topics, it felt appropriate to include it into the results. It was therefore a combination of predetermined and new themes chosen.

4.7 Ethical Considerations

In research, ethical concerns may arise when it comes to collecting data, gaining access to an organization and individuals, therefore appropriate behavior must be conducted concerning the individuals and organizations that are affected by the study (Saunders et al., 2009, p. 183-184). Ethical issues in qualitative research revolve around many different things, mainly about the participants of the interviews and the interviews themselves. These issues are: acquire informed consent, ensure participants anonymity and confidentiality of information, avoid deception, do no harm to the participants (Denzin & Lincoln, 1994, p. 89; Tracy, 2013, p. 243; Bryman & Bell, 2011, p. 128; Saunders et al., 2009, p. 185).

Informed consent is described by Saunders et al. (2009, p. 190) as the voluntary participation by the interviewees in an interview and the handling and processing of the data for the stated research purpose. When the authors contacted possible participants for the study, voluntary participation was stressed, information about the time, place, and duration, purpose, and handling of the data was clearly communicated. This was done to ensure that the participants had all the necessary information about the interviews before agreeing to participate in the study. The issue of consent was also addressed at the beginning of each interview, with regards to both participation and recording of the interview to be able to handle the data more effectively after the interview.

Included in the emails sent out to the participants and at the beginning of each interview, information about participants' confidentiality as well as the confidentiality of the data was brought up to ensure that participants were aware of how the handling of the data would proceed. To ensure this, the researchers have left out the names of the participants and the name of the companies participating in the interview. Instead, has each company been named “Company 1,2, 3..” to not reveal the real name of the company. Also, avoided any descriptive terms that may be used to identify the participant or the company by their peers. Descriptive terms when it comes to the position and job description at their respective company is to ensure that the participant is suited for the study and that they are working with what the study aims to investigate. The anonymity of the companies the participants work for was offered to them to ensure that the participants felt comfortable talking about certain questions without feeling that they were revealing information that they maybe should not reveal. Some quotes have been modified since they could tie some characteristics or product of the company to the company name.

Deception is when researchers misrepresent the actual purpose of the research as something other than what they are actually trying to investigate (Bryman & Bell, 2011, p. 136). To ensure that there is no deception in this study, the authors carefully explained the purpose of the study when contacting the participants to build trust and to ensure that the participants felt that they were not deceived when conducting the interview. Further questions about the purpose of the thesis were also offered when contacting the participants to ensure that they could inquire for more information to increase the transparency of the purpose.

Bryman and Bell (2011, p. 128) state that harm to participants can come in many forms, namely: harm to personal development, physical harm, stress, and harm to future career prospects. To avoid any harm to the participants of this study, the authors have designed the interview guide to not investigate questions that would revolve around any confidential information, and stressing the voluntary participation of the participants to ensure they feel comfortable answering the questions.

When contacting the participants, the authors offered to adapt the scheduling of the interview after the participants' schedule to avoid any cause of stress and to further ensure trust. Physical harm is avoided and was further ensured avoidance by conducting the interviews through Internet-mediated platforms such as Skype, Zoom, Google Meet, and Microsoft Teams. Denzin and Lincoln (1994, p. 93) argue that the most likely source of harm in research comes in the revealing of personal and private information. This was avoided by ensuring the participants' anonymity and avoiding including descriptive information about them. Furthermore, the interview guide was designed to not investigate any confidential or controversial information to ensure that no harm would come to the participants in any form.

5. Results

In this chapter, the collected data is presented following the subjects discussed in the interviews. Data was collected from interviews with two chatbot-provider companies and five companies that use chatbots in their business, along with secondary data from written documentary sources on chatbot-providers websites.

5.1 Presentation of the Companies

The Interviewed Companies

Company 1: The first interviewed company works within transportation, more specifically, they are a Swedish travel enterprise that offers travel more sustainably. The person being interviewed worked with strategy and innovation within the company.

Company 2: The second company is a banking group that offers several financial activities, such as retail banking and asset management. works in the banking and finance sector and is engaged in several other countries besides Sweden. The role of the interviewee was within customer service.

Company 3: The third company is a municipality-owned company that works foremost with selling and distributing power (electricity, district heating, remote cooling, etc.) as well as selling broadband. This person worked with consumer solutions and digital business development.

Company 4: The fourth company is as well a municipally owned corporation that works with selling and distributing electricity, broadband, district heating, etc. The interviewee worked within the CRM department, which included web services and all communication with consumers,

Company 5: The fifth company works with unemployment funds and insurances that seek to help its members with finance when unemployed. In this regard, the classical customers are not the case, instead, members are part of the company's customer base and they pay an amount per month to be a part of this organization to be able to get funding. The person being interviewed had a role as division manager within the company, more specifically, responsible for the chatbots and the communication system.

All the interviewees had different areas of responsibility, some within CRM, and others within chatbot and digital technology. Therefore, it varies the amount of rich data from each interviewee.

The Interviewed Chatbot Providers

Zlingit: As mentioned earlier, Zlingit is a Swedish startup that helps businesses with understanding their customers and increasing customer engagement by different digital solutions, such as chatbots. The interviewee from this company was the CEO, who has a holistic perspective of the company's operation.

Leadoo: Is a Finnish company that specializes in lead-driven marketing and sales through their platform which houses different kinds of chatbots. The interviewee has the role of a country manager and is responsible for both the operative and strategic processes within the company.

Secondary Data from Chatbot Providers

Vergic: A Swedish company that works with an engine that assists companies with digitally engaging with customers through bot-assisted services, external messaging channels, live chat, etc. (Vergic, 2020a).

GetJenny: This company focuses as well on lead generation, customer service through chatbots, however, they also assist companies with internal support. More specifically with sharing knowledge within the company through innovative chatbots, etc. (GetJenny, 2020a).

Ebbot: Swedish company that focuses solely on chatbots and automation for companies within customer service, sales, IT/Helpdesk, and HR (Ebbot, 2020a).

Drift: A company which according to them, is the first conversational marketing platform. They focus on customer relationships through various platforms, but chatbots are their main tool (Drift, 2020b).

5.2 CRM

This section addresses the different kinds of CRM practices that the companies utilize. Firstly, the CRM applications are presented, both the CRM systems that the companies use and then how they work with CRM in general. Then the social CRM aspect will be presented.

5.2.1 CRM within Companies

The first company works with CRM that focuses on the customer service aspect as well as some personalized marketing through emails.

"First of all, we have a loyalty membership program ... where we can build a relationship with our customers where we have three different levels." – Company 1

The use of a loyalty program makes it more advantageous for customers to increase their engagement towards the company since it leads to them getting more out of traveling with Company 1. In return, the company receives more data regarding the consumers traveling with them, so that they can improve the relationship with these consumers.

As well, this company uses two different platforms for their CRM management. They have mainly one system that focuses on the customer database. However, they also use a system besides the central CRM system which focuses on the personalization and segmentation of customers. Depending on where customers live, they can adjust their mail according to their customers' location so that content becomes more relevant.

"…we send out emails and we personalized them according to … relationship that we have with the customer, what we know about them…" – Company 1

The second company's use of CRM differs from the first company since their relationship with their customers is built mainly on trust. They also use a system where they log each time they have spoken to a customer, so the next time the customer is in contact with the company, the employees can see what has been said during the last encounter with the customer.

"…after you have, I am meeting with a customer, you log everything you have done with the customers. So, so in order for when the customer comes back and meets another employee, so the employee can just know, okay, this customer met this person last time, and this is what they've done. So the customer then doesn't have to repeat himself. " – Company 2

It is also mentioned during the interview that they use CRM in practice as well. For example, when they see in their CRM system that some customers may need to book an appointment with the company since they may need a personal advisor regarding their finances (which can be seen on the customer page in the system). They call the customer directly and ask if they want to book an appointment or not. Then the customer does not need to ring or visit the company to book an appointment manually.

The third company's view on working on CRM is quite holistic and therefore do they work with CRM in numerous ways. In general, the company uses the customer lifecycle theory as a base combined with efficient CRM systems.

"... we are very careful to make a distinction between CRM as a system and CRM as a concept. After all, we work with this entire customer lifecycle to have the usual standardized 360 perspective." – Company 3

However, whilst having efficient CRM systems, some of them were a bit outdated and should be changed out. It was explained that some of the programs used are harder to incorporate with newer technologies.

" Of course, some of our systems are so damn old and bad.." – Company 3

Company 3 works a lot as well with sales and loyalty programs, which can be compared to Company 1 that worked with a loyalty program.

"It makes more money to keep a customer than to get a new one." – Company 3

Further, Company 3 focuses a lot on sustainable aspects and to build loyalty from the customer surrounding this area.

"We invest a lot more on sustainable aspects, and we want to help customers optimize. Actually, we help the customers eat at our own business and help the customer and be environmentally friendly by optimizing their consumption and we sell less. But we think that's the way forward. You can't slip in that race. It is part of the loyalty building." – Company 3

As most of the interviewed companies, Company 4 works with a CRM system that houses a database of all their customers. It is stressed that this system needs to have the correct contact information for each customer.

"It started with a sort of pretty lousy customer database and to be really good in, in the CRM, you have to have a lot of good digital contacts, so you have to start there. It sounds boring, but it's really, really important if you want to reach out to the customers and sort of find them and reach them and where they want to be reached, in the right time and moment." – Company 4

A "CRM wheel" is presented during the interview, this wheel is a visual tool that helps the company to know when they need to be in contact with their customers. For example, when a new subscription is to be made, or if a quality survey of the service needs to be sent out.

“We have a sort of a CRM wheel for the year where we have already set dates when we contact customers in certain areas…” – Company 4

The existing customers are being contacted to see if their current service could be more streamlined or if the agreement plan needs to be altered. As well, another reason why they contact their existing customers is to make them more interested in all the different services. Since they provide a variety of different services, as mentioned earlier.

“..then we have a lot of communication for the existing customers that we sort of try to make them more interested in all our services. We are not only a electricity company. We have a district heating and district colding. We have gas, we have fiber and a lot of services. So, trying to broaden the sort of offering to our customers on an upsell and also inform them how to be more effective with our sort of business product portfolio.” – Company 4

Like some of the other presented companies, Company 4 also has loyalty in mind when thinking of their customer base. For this company, it is not the service itself they are trying to sell, they are trying to sell their brand to people.

“We also try to, to make them more loyal since we're not just selling things, we are sort of selling the brand to the customers like those where we have a social responsibility in the town.” – Company 4

It is mentioned that the company has had it hard to make customers loyal to them since the service they are selling is not a service that people want to be especially loyal to.

“...you have two kinds of customers to accompany. You'll have one category that is not interested in your services. Okay. And then you have another category and those are really not interested.” – Company 4

As well, through discussions with its customers, this company stresses the economic and environmental perspective that customers need to have in mind when choosing their company as the preferred choice in the city. These discussions are held at various platforms, one of these platforms are social media, such as Facebook, Instagram, and LinkedIn, which naturally allows customers to be able to respond to the company. It is also mentioned during the interview that telephone calls are also something that they still use a lot.

Another big part of the company’s CRM perspective is to be able to help customers with different errands through customer support.

“…we sell a lot of things and we also have a lot of service errands, we have a customer service that is pretty big, that takes a lot of calls. And that is also, I think it's part of the CRM work…and help the customers when they have errands they want to be solved and also have a sort of contact with the customers from our sales departments…” – Company 4

As with Company 3, this company has CRM systems which work somewhat efficiently, but are quite outdated.

“…we also have sort of a engine of the with all our customers in it, but there are pretty outdated in intelligence.” – Company 4

5.2.2 Social CRM within Companies

Company 1 mentions that the communication they have with their customers is both through a live chat that they have both on Messenger and the Facebook Wall, as well through email. Communication by text is personalized depending on the relationship with the customers.

"…we send out emails and we personalized them according to relationship that we have with the customer, what we know about them, for example, where our customer live for example. Then we can adjust the content of the email." – Company 1

They also have a live chat on their website through an external platform, this can be accessed both through the mentioned website but also through their app.

Company 2 uses quite a formal language with all its customers, it is not personalized depending on the customer. But as described earlier, the reason for this is to emit trust and safety to the customers. Other than that, it was not mentioned during the interview if they worked in a specific way with social CRM. When conversing with their customers, they use mostly telephone and face-to-face meetings. As well, no social media interaction with the customers is apparent too.

"Well, we don't, I will not say we interact with customers on social media because it's like, it doesn't feel professional.." – Company 2

The third company had used live chat for quite some time, it was described during the interview as a competent communication tool.

"We have had a chat for a long time, a regular chat where a person sits and answers. We have had this for quite some time, and it is very effective…" – Company 3

Company 4 uses social media today quite thoroughly, which was not the case earlier.

"social media for sure, where we are pretty good on Facebook, Instagram, and LinkedIn, where we were not present for four years ago more or less." – Company 4

Live chats are also an evident part of the company, where they see the discussions with the customers as being quite fruitful.

"And we have really good discussion with the majority of the customers.." – Company 4

"call it continuous ongoing discussions with customers…we have copywriters that are answering all the questions…if we have really sort of interesting questions that we have to investigate, we take them back to our organization and then we call the customer and the discussion that way, or, or send out the general, the answer to all customers can see what we sort of our position in some questions are." – Company 4

It is also explained that they have specific people answering all the questions from the customers on every platform that the customers contact them on. Furthermore, if some questions are more important than others, these are taken back and discussed internally within the company and then presented to all of its customer base.

A big part of the fifth company is their live chat that is provided to its members during specific times of the week to help members with their questions.

"…we had a human chat only on Mondays because it takes so much manpower to keep it. And so we had it on Mondays and at that time, I think we had during the whole day, I think they sat for two hours at a time." – Company 5

However, it is explained that this live chat takes up quite much time and resources to maintain.

"But in, in general, I would say chatbots just provides a more natural way of communicating with a company. You can see like all the data, more and more companies are applying chatbots because like the new generation, we don't call, we don't email we trying to use like a message system to get in contact with people." – Zlingit

As explained in the quote above, messaging through various platforms is becoming the normal way to be in contact with each other, and not email. According to Zlingit, chatbots could provide more personalized contact with companies.

5.3 Automation

This section addresses the different kinds of automated technologies the companies utilize. The different kinds of automation were drawn from section 3.3 regarding automation in operational CRM.

5.3.1 Chatbots

When discussing the implementation of chatbots in companies, it was evident that different applications suit different purposes. The specific application varied from each company. For instance, Company 1, 2, 3, and 4 implemented chatbots with customer service in mind. The location of the chatbots differed for each company, as Company 1 and 5 required BankID to log in to "My Pages" to ensure that the chatbot could handle the confidential information for the right person, while Companies 2, 3 and 4 had their chatbot available on their websites when customers land on it.

"They want the technology or the person behind knowing exactly what kind of problem you have and the emails that you sent a week ago. What we need, what did we reply to them? And the customers, they expect a personalized answer and experience." – Company 1

"If you have a quick question you can just ask on the chatbots and then you get answered directly instead of waiting in line on the cell phone or something like that. So it's really flexible and easy for customers to use." – Company 2

"We started without a bot eight months ago. It's only customer service, outbound to the customer." – Company 3

"…we have a chatbot, it started out as a chat that we put a bot onto, that handles questions from the customers… I think it answers around 60% of the questions pretty good" – Company 4

Companies 1-4 use chatbots for customer service, but they are not integrated into the CRM-systems fully. Company 3 and 4 mention that they put some data from the chatbots that they later put into their CRM-system manually. For Company 4, the full integration of the chatbot into their CRM-system was planned but halted due to the privacy of information concerns.

The differences in chatbots for each company were evident in the interviews. Some companies have implemented more sophisticated chatbots that can handle more complex customer inquiries than others. For instance, Company 1 and 2 have chatbots that are very rudimentary and mostly designed to be able to handle FAQ-questions and simple customer inquiries.

"So right now we just have an FAQ and there it's very visible that it's not a person you're talking to. And if you want to talk to a person, then you have to click your way through, like take contact with us." – Company 1

"…when a customer has quick question to ask, he or she can ask that question in the chatbots" – Company 2

The amount of complexity the chatbot can handle is somewhat connected to the integration of AI. Noted by Company 3 is that AI is merely a buzzword that is thrown around for more advanced bots. It was noted that AI should be able to learn itself, however, it is not always the case. This was also brought up by Company 5. However, on chatbot-providers (Drift, Ebbot, GetJenny, Vergic) websites it was noted that they use AI for their chatbots.

"I noticed when I was benchmarking chatbots and platforms that nobody has any AI. It's not AI, you have to train the bot yourself. Nobody has an AI in which the chatbots is learning as they go when they answer questions. There is always someone in the background that is training it" – Company 3

"It's our suppliers that have the AI trainers. But what our staff is, we go through all the logs and we mark up every different wording… So we give them input for the training" – Company 5

The interviewee from Company 3 shared his reflections of most chatbots on the market at the moment and described them as: *"FAQ-questions with make-up"*, meaning that the current offerings of chatbots can handle FAQ-questions in the form of conversations with the customer instead of simply listing FAQ-questions on the webpage.

As explained by the CEO of Zlingit, chatbots have the potential of being used in a wide selection of cases, even for CRM applications. This sentiment was also brought up in the interview with Leadoo:

"I would say that a chatbot would be good in lead generation as I told before, or in customer service, you can use it in recruitments" – Leadoo

However, it can easily be said that many of the interviewed companies have limited their use of chatbots to only specific tasks, whereas the view from chatbot-providers is broader. Ebbot (2020a) mentions that their chatbot can be used within four distinct business areas: human resources (hiring/recruiting, answer questions about recruitment, etc.), information technology (help staff with software, facilitation of system administration, etc.), customer service (provide service to customers, reduced congestion and manage customer queries, etc.) and sales (generate leads, closing sales, etc.). Customer service and sales are two areas discussed previously, however, HR and IT are two areas brought up by Ebbot not discussed by other companies, except for Leadoo that mentions recruitments for their chatbot.

5.3.2 Market and Salesforce Automation

Chatbots implemented in the companies interviewed were mostly assigned for customer service operations that relate to the chatbot answering customer service inquiries and relieving the customer service reps. However, the interview with Company 3 revealed another form of technology that assisted the company in CRM-operations, namely market operations.

"We have a marketing automation system that lies on top of our CRM-system that works with triggers from the CRM-system" – Company 3

The marketing automation (MA) system spoken of is built in a way that it reacts to certain triggers. The MA-system logs the interactions with the customers and sends out designated material specifically targeted to that customer. An example brought up in the interview was how customers interact with material sent out via email and the webpage: if a customer would visit their webpage to find out how much it would cost to install solar panels on their summer house, the MA-system would log their activities in the system and then log it into their CRM-system to create a more personalized offer to the customer.

Before such a system was implemented, the continual customer contact was low. When new customers bought the company's service, the customer got a confirmation and a welcome letter, but then only invoices were the direct contact that they had with their customers. Now with the new automation system that has been implemented, the contact with customers is much more continual and automated.

"A few years ago we were completely silent… We are very capable of confirmation and stuff, then the customer did not hear anything from us except the invoices, until it was time for an agreement that was about to expire." – Company 3

Company 3 was the only interview in which an MA-system was discussed more in-depth. However, the interviews and secondary data from chatbot-provider alluded to this kind of system being more readily available for B2B customers. MA-systems are discussed more frequently by the chatbot-providers such as Zlingit, Leadoo, Drift, and Ebbot:

"I think chatbots is the best way to improve marketing efficiency in terms of lead generation, retention, and to create like the more, what do you call it? A more natural type of contact space" – Zlingit

"Leadoo is a, or was a Chatbot company that now is turning to a marketing automation company. So we help clients to convert more from the passive visitors on the website to become more qualified leads… clients usually seek out our services because they have too low conversion rates on the website and wants to create a good customer experience together with a function that will help them to increase the conversion rate and get more qualified sales leads" – Leadoo

"The Vergic Engage platform allows site owners and customer service agents to engage with individual customers… identify and build profiling data based on an individual prospective or existing customer's on-site behavior and interests, then use algorithms for customer engagement for lead/sales conversion or customer support. These act as automated and agent-assisted solutions for lead generation, sales conversion, and/or customer service and can be based on a wide range of opportunities or problems." – Vergic (2020e)

"A Drift chatbot is a powerful tool that can ask your qualification questions and create leads in your CRM." – Drift (2020d)

"Ebbot makes your business available 24/7 on multiple platforms through full automation… and can generate company leads even when the office is closed" – Ebbot (2020a)

The chatbot-providers discuss the chatbots as being able to integrate fully with CRM-systems and being capable of generating leads through automation by interacting with customers. Lead generation was discussed with Company 4, but they mentioned that they were about to implement a system to generate and pursue leads more effectively, but when GDPR was implemented they had to abandon that project.

Some of the B2C companies interviewed used chatbots provided by companies such as Vergic, Ebbot, and GetJenny, however, they were not used to the potential that is being described by the platform-providers themselves.

5.3.2 Impact of Automated Technologies

One section of the interview guide was dedicated to investigating whether any results or changes can be seen from the implemented chatbots. Questions were asked about results in cost efficiency, customer engagement, lead generation, and resource allocation.

For some of the companies, the interviewees did not have access to the information about the results, not know the specific numbers, or could not see any results due to how recent the chatbot project was. However, some information about the impact of chatbots could be drawn from the interviews.

"…we have seen that just having a chat lowers the cost" – Company 1

"*I don't think that the chatbot itself has produced any measurable results, however, it's just providing good service, and that it could be available 24/7"* – Company 3

"The optimization journey that we have worked hard on… it has led to that we've been able to reduce the amount of personnel. We have been able to move around people from working with inbound marketing to work with sales instead of hiring more salespeople. We have reduced it, but not in the form of firing people, but we've been working a lot with consultants" – Company 3

"I think the customer satisfaction is one I've seen best evidence of this is one of the sort of channels that they can reach us. And the customers tend to like it we have good discussions in the, in the chat, but the cost is still there. It's not much for the sort of service it's not expensive in that sense. We have a lot of services that are much more expensive, so it's more a technique of reaching the customer. We have not sort of made any changes in our personnel in customer services so far" – Company 4

"So has it reduced our work in the customer service? I don't think so. I think we are just, just open up a new channel and increase the customer satisfaction" – Company 4

"With the help of GetJenny, they were able to automate more than 60% of their online support already during the first month and provide the best possible customer service in more complicated matters." – GetJenny (2020b)

"I think there were six caseworkers only working with the chat with the human chat that took a lot of resources. And now that we have the chatbot, there's so much fewer that has to go" – Company 5

"…the live chat or the human chat, that's where we were made the cost efficiency because they can do more, they can do more, spend more time making sure our members get their money instead of just answering, so that's the only one we have like hard numbers to show that we have cost efficient" – Company 5

"We've had it for less than a year and it hasn't been working perfectly, it still doesn't work perfectly, but it's the last couple of months that has been it has been able to answer more and more questions and it happened at the same time as the corona crisis. So it's really hard to see all the phone levels have gone up and all the chat interactions have gone up and all the emails are going up. So it's really difficult for us to say (if increasing interactions are only circumstantial)" – Company 5

Results that could be seen range from lower costs, as noted by Company 1; allocating resources in the form of personnel, as noted by Company 3 and 5; and increasing customer satisfaction as discussed by Company 1 and 4. Company 5 noted that the cost efficiency achieved was not achieved through the chatbots, but through the normal chat as the people chatting with customers were able to handle more complex customer inquiries.

Something discovered in the interview and the secondary data was also the intended impact of the chatbots. This gives some insight into how the chatbots were intended to impact business operations and the goals for the chatbots for companies who implemented them, and the companies that provide the chatbots and platforms.

"The chatbot… the goal there is to increase the customer satisfaction to make the customer journey as smooth as possible" – Company 1

"Our goal with the chatbot… is that it will be able to handle 80%, not of all customer communication, but by those that choose to chat with it the goal is for it to handle 80%. It's a high target, so we are not there yet… Today I think we are at about 30%" – Company 3

"…for the companies itself because they can improve the response rates and basically improve the, what do you call it, the customer satisfaction" – Zlingit

"…chatbots to engage with customers through more personal contact to increase customer satisfaction" – Drift (2020c)

As for the results, it can be seen that customer satisfaction, availability, cost, and resource allocation were present results in some of the companies that have implemented chatbots for their business. The intended purpose of the chatbots from the perspective of the provider differs somewhat.

5.4 Personalization

One theme that emerged during the interviews was the desire for a more personal connection with the customers. Companies brought up the main form of communication with the customers as emails. Many companies interviewed even stressed the fact that emails are still the most effective way of reaching out to customers and communicating with them. However, chatbots-providers perspective on emails differed, they saw them as a form of one-way non-personal form of communication. According to Zlingit, emails to customers are not an ideal way to create customer engagement, as they can be easily ignored and otherwise sorted into junk-boxes.

"Chatbot marketing is a way to start engaging with fans in a more natural way. If you look at who you have in your, like in your Messenger, it's friends and you usually have companies in your email and that's why you don't have so much engagement with them. So, what we're trying to do is like can we actually, we'll make it fun and more personalized" – Zlingit

This view was also brought up by Leadoo, as a behavioral shift in communication:

"So, I can see how the behavior is changing from something that was more drawn to like contact forms emails and phones, to something more fast and more in line with where we are technology-based today" – Leadoo

According to Zlingit, the way that people communicate today is mainly through chats. 76% of people have Messenger downloaded on their phones, and Zlingit views that as an ecosystem that can be utilized instead of building platforms on websites and in apps.

"…If you look at who you have in your, like in your Messenger, it's friends and you usually have companies in your email and that's why you don't have so much engagement with them" – Zlingit

Zlingit's view is that to make marketing more personalized, it is not only about reaching the customers with a personalized offer. It is also important to reach their customers on a personal channel, such as Messenger. As mentioned in the interview by Zlingit, companies are sorted in your emails and you have your personal connections in your messenger.

Zlingit discusses the personalization through this automation of chatbots:

"So, everything is automized. So, based on what you do in the system, then you get a response basically from the club. So it feels like that you, I wouldn't say it's like super and it doesn't feel like there's a person writing to you, but in some way, you feel like there's still an interaction in that system. It feels more personalized" - Zlingit

The view of companies interviewed mentioned personalization, but mostly in the form of personalized offers:

"…we send out emails and we personalized them according to and their relationship that we have with the customer, what we know about them, for example where, where our customer live for example. Then we can adjust the content of the email" – Company 1

"...you log everything you have done with the customers. So, in order for when the customer comes back and meets another employee, so the employee can just know, okay, this customer met this person last time, and this is what they've done" – Company 2

"*And then you have communication that is personalized. You reach them in the right moment in the right place"* – Company 4

This finding shows a contrasting view of what "personalization" is to companies that work B2C and the companies, such as Zlingit and Leadoo, that are providing chatbot platforms.

6. Analysis and Discussion

In this chapter, the qualitative empirical findings of the study are analyzed according to the themes and sub-themes that emerged from the data. The contents are analyzed and discussed with existing research. Lastly, this chapter ends with a presentation of key findings.

6.1 The Use of CRM

As defined by Kotler and Keller (2009, p. 173): *"CRM is the process of carefully managing detailed information about customers and all customer 'touch points' to maximize customer loyalty"*. Each company interviewed was familiar with the general concept of CRM. Though the use of CRM in each company differs from each other since the interviewed companies are in different industries, thus their relationships with customers are different too. However, something that was universal for all the companies interviewed was the presence of a centralized CRM system, but also the general concept of CRM surrounding the different customer processes in practice. The different centralized CRM systems that the companies have differ depending on what the main objective of the specific company is.

In each of the presented companies, an internal CRM system was in use which contained a database on all their customers. This system collected information about their customer base, logged each time they had been in contact with the customers, added functionalities that could enrich the customer relationship (for example through seeing if the customer needs additional support through the system, as in the case with Company 2 that worked within banking and finance). This type of CRM can be linked to one of the four different types of CRM: Strategic, Operational, Analytical, and Collaborative CRM. The definition of Analytical CRM as described by Buttle and Maklan (2019, p. 6): *"the process through which organizations transform customer-related data into actionable insight for use in either strategic or operational CRM"*.

The CRM systems that are used by the companies can be connected to the analytical CRM since these systems are used for handling data in the companies. These CRM applications are used for storing, processing, using, and reporting data, which is in line with the definitions of analytical CRM by Buttle and Maklan (2019, p. 13), and Kottler and Keller (2009, p. 182-183). By having an internal CRM which documents data on customers, the companies can solve customer issues and enhance services for the customers. This is seen both in Company 2 (banking and finance), which helps their customers by recommending them advisors when they see that they are in need. But also seen in Company 4 where it was stressed that the CRM system is used to assist the customers in different service errands. Something which was noted from the interviews was that depending on the area of responsibility and job description that each interviewee had, the knowledge on how the company worked with CRM in the company differed. Of course, the way companies work with CRM differs, some work more with CRM then others, which was previously mentioned. The participants in the interviews had roles ranging from CRM specialists to IT managers. It is therefore quite natural that the knowledge of CRM within the company could be answered better by some. Something interesting as well was that the chatbot-providers' perspective was quite limited surrounding CRM. Though, it was stressed by them that the ease of their tool, specifically chatbot platforms, should be easily linked to most of the CRM systems. This perspective of ease was not the same as the interviewed companies who used these chatbot platforms. There was an evident link missing between the chatbot-providers platforms and the companies' CRM systems.

6.2 The Use of Social CRM

As mentioned previously, the concept of conversational marketing is the buzzword that is used by practitioners, while sCRM is the moniker that is applied in academic literature. In the interviews and the secondary data, the authors encountered some connections with this concept to how companies work or strive to work when engaging with customers. CRM was a concept that was very accustomed to each interviewed company. However, when the concept of CRM was asked about, many of the companies did not know exactly what this meant. Even though none of the companies knew what the theoretical concept of sCRM meant, many of them still worked with it practically in some way. The concept of sCRM is defined as: *"... a philosophy and a business strategy, supported by a technology platform, business rules, workflow, processes and social characteristics, designed to engage the customer in a collaborative conversation in order to provide mutually beneficial value in a trusted and transparent business environment"* (Myron 2010, p. 28). This is linked to different technological tools that can enable CRM in different ways, and as seen in the results, live chats are a big part of companies' strategy when working with sCRM. Depending on which industry the companies work in, the level of conversational practices with customers is varied. For example, in Company 2 (banking and finance) the level of personalization and conversational practices are low, whilst compared to Company 1 (transportation) and Company 4 (Energy) these have higher personalization and increased conversational approaches.

It is quite evident that the concept of Conversational Marketing is a buzzword created to attract potential customers by the chatbot community. It can be argued that this concept is a simplification of social CRM. As presented earlier, the definition of conversational marketing according to Iyer (2014, p. 13) is a tool that helps to build and sustain personalized conversations between customers and companies across several marketing channels, to both increase revenue and the effectiveness of marketing. This definition is in line with the definition of social CRM that is presented earlier. Instead, if chatbot-providers would link their services toward social CRM, companies buying their service would have an easier time understanding the significance of this notion and better link it to their CRM applications.

As mentioned by Zlingit, people tend to have more personal connections through social media, while the connections with companies are more diverted to emails, and this has implications for customer engagement. Therefore, should companies try to shift to customer interaction from outbound mail dispatches to a two-way dialogue through chats, for example. It is quite obvious that the bigger companies will have it harder to answer all their customers' questions with only humans as resources, and it is here that chatbots become a necessary part of the company. By introducing chatbots through both their websites but also platforms such as Messenger and Instagram it will be easier to interact with the customer base. Since they are already active on such platforms. As well, it is more easily available to have a dialogue since it does not entail writing an email where the language is more often formally compared to the more casual language on social media.

By shifting to more casual platforms when being in contact with customers, the companies will be able to connect to a larger base since more of the potential customers are active on social media. This is in line with Sashi's (2012) Customer Engagement Cycle, which explains that this is a prerequisite for creating customer engagement.

The second phase of the cycle is integration, by implementing chatbots, customers can more easily pass complaints and inquiries to the company. By having chatbots, can the customer be replied to faster, and then if special service is needed the chatbots can escalate the inquiries to correct personnel which can then answer the customers' specific question. If not a chatbot, it can take some time for human live chat to answer the customers' questions since there will most likely be waiting time or even a cue for interacting with staff. Then escalating the question to proper staff can become a hassle since not always it is clear who should answer which questions.

6.3 Automation

Automation of business processes was brought up in Chapter 3, in which Buttle and Maklan (2019) outlined three areas of automation within Operational CRM that the authors investigated during the interviews. These areas were market automation, salesforce automation, and service automation.

Market Automation

Market automation is defined as: *"... the automation of information systems-based tools and techniques to allow marketing departments to better identify and target customers, more importantly segments of the market"* by Boon et al. (2002, p. 86). The usage for market automation in business is to create a system that automatically acts on triggers in customer behavior to create a more personalized offer, at the right time, for the right customer (Buttle & Maklan, 2019, p. 9). The MA-system that was brought up by Company 3 functions somewhat in this way, more specifically when it comes to better identify and targeting customers. The system discussed in the interview is connected to their CRM-system that logs the customers' previous interactions with the company and marketing material sent out by the company and then "activates" when the customer is looking for a special offer. When "activated" offers are sent out to customers at that specific time. In this sense, the MA-system creates personalized offers for the customers that have expressed an interest in their products which was evaluated through their previous interactions with websites and marketing material. As discussed by Buttle and Maklan (2019) these personalized offers through automation are meant to acquire new customers and to retain existing customers. The engagement cycle by Sashi (2012) explains that the retention of customers is an important part of creating customer engagement further down the line in the customer lifetime.

Furthermore, MA-systems as discussed by Buttle and Maklan (2019) mention that these systems are capable of handling marketing operations such as event-based marketing and sending out brand content automatically. This aspect of the MA-systems was not discussed with the companies, which indicates that this is a purpose that the system for Company 3 is not designed for. The operations that it is capable of handling is mainly focused around targeting individual customers and not segmenting customers on a larger level. This type of process was discussed as the process of generating and nurturing leads for the company, which is explained further in the following section.

During the interviews, the authors asked whether the companies utilize automation when it comes to generating and sending out brand content. This was in some cases, outside of the area of expertise of the interviewee. In the cases where the interviewee had some knowledge of this, they explained that it is not currently a part of their business and that automation of marketing was mostly about personalizing offers for individual customers. The channel for the personalized offers mostly emailed, as most companies argued that it was still the most effective way to reach customers.

Zlingit gave a contrasting view of this and mentioned that emails are mostly ignored and if you want to reach customers, you have to reach them on platforms that they are using more frequently, such as Facebook Messenger.

When it comes to market automation, the discrepancy in views of companies and chatbot-providers was clear, as only one of the interviewed companies used such a system: Company 3. For them, it was a separate system, so it was not affiliated with the chatbots. According to chatbot-providers, their chatbots are supposed to be able to function in this domain and automate marketing processes. What was even more surprising was the fact that Company 3 had previously worked with one of the chatbot-providers for implementing their platforms.

Salesforce Automation

Buttle and Maklan (2019, p. 10) outlines processes in which salesforce automation is useful: lead generation, lead qualification, nurturing leads, discovering needs, developing value propositions, negotiating, and closing a sale. Lead generation, qualification, and nurturing were discussed more in-depth with Company 3 that had an established MA-system in which they used for generating leads among others, as discussed previously. Even though Company 3 called it a system for "marketing automation" some of the processes identified in the interviews fall under the category of sales force automation.

With the CRM-system that logs interactions with customers to create more personalized offers for customers, the company is nurturing its leads to improve its value proposition for that specific customer. Company 3 discussed that their MA-system keeps track of customer behavior on their websites and how they interact with their marketing to identify a need for the customer. This sort of an operation is lead generating as the customer in question is investigating the company's offerings which later is logged into the company's CRM-system. For people that visited the website for the first time and looked into price lists and services of the company, the system logged these leads as interested, thus the system operated with lead generation to follow up on.

In the case of Company 3, they discussed the MA-system as a separate system from their chatbots. However, according to the chatbot-provider companies such as Zlingit, Leadoo, Drift, and Ebbot, their chatbots are capable of handling the information provided in the interactions with the customers through their chatbot and log them in the companies' existing CRM-system to generate leads.

This suggests that the automation systems do not need to be separated, but would rather be integrated into one system, a chatbot. This finding implies that chatbots could be used in a more advanced setting and not only handling FAQ-questions but rather handling conversations with customers can compile customer information relevant to making sales at the same time it is handling customer inquiries. The chatbot would not even have to be present on a separate platform on their website. According to Zlingit and Leadoo, chatbots could be integrated into the platforms that people commonly used, such as WhatsApp and Facebook Messenger, thus reaching the customers on a more personal platform. This chatbot would then be connected to the company's CRM-system and be able to handle conversations with customers on platforms where the customer is easier to reach. The potential for this aspect is quite large as a chatbot could engage in a lot of sales activities including lead management and closing sales, as noted by the chatbot-providers.

Service Automation

Service automation was brought up in all of the interviews conducted. This was the primary purpose of the chatbots discussed in the interviews. The chatbots discussed with the companies and the chatbots-providers varied in characteristics, purpose, complexity, and results. Most of the chatbots were more connected to the companies' customer service operations for handling simpler customer inquiries, such as FAQ-questions, and then handing over the more complex tasks to a human service rep. Chatbots are becoming increasingly used in companies today, as brought up by Buttle and Maklan (2019, p. 11-12).

As brought up by Company 3, chatbots that are used by most businesses today are not really "there yet" when it comes to the amount and complexity of what they can handle, in this case, customer service inquiries. "FAQ with make-up" was a phrase used to summarize the level of complexity of the chatbots on the market by Company 3. In this sense, chatbots can handle very basic questions from customers and relieve customer service reps in the sense that customers with "easy" questions are not directed to them and allows them to spend more time handling more complex issues for customers.

For Company 2 and 5, the nature of their business requires some sensitive information to be handled, in which the chatbots were available on the websites once the customer had logged in with the use of BankID. Privacy was a sentiment that was brought up in other interviews as well, as the chatbots are not able to handle customer inquiries that would require the personal information to be handled, as they did not yet have a way to allow the customers to identify themselves to the chatbot. This limitation prevents the chatbot from handling certain customer inquiries related to billing information and invoices, even though the inquiry itself is quite simple.

For Company 1, 3, and 4 the chatbots were available on the company homepage to assist the customer when they first land on the webpage. This availability allows the company to easier connect with the customer, where the chatbots would serve as the first line of contact and redirects the customer to the proper page or a human service rep if required.

The chatbots discussed for most companies were able to handle more rudimentary customer inquiries and make a hand-over to a human service rep when the questions fell outside of their programmed responses. However, the availability of a chatbot is one aspect of customer service that is greatly beneficial for the company. It makes the company available to serve customers around the clock and increase customer satisfaction. It was noted by Company 3 that even if the chatbot had not produced any measurable results, it was clear that it gives great service and increases satisfaction by being available at hours that a service rep would not be available, even if it is not able to handle the most complex complaints. The increase in service quality could not just be seen within the chatbot's performance, but through the reduced workload for the customer service personnel. When the chatbots handled simple customer questions and inquiries, it would free up the human personnel to handle the more complex questions and inquiries. In this case, the chatbot would provide quick service to customers, while the human personnel also could provide service to other customers, thus increasing the overall satisfaction for customers by resolving more issues faster.

6.4 Impact of Automated Technologies

In this section, the practical results that could be seen in the companies from chatbots and automation are analyzed and discussed. In the interviews, the authors asked the companies if any concrete changes could be noticed when it comes to cost efficiency, lead generation, resource allocation, and customer engagement.

Allocating resources was brought up by Company 3 and 5 and they argued that the implementation of chatbots has allowed them to reallocate personnel to handle more complex customer questions and inquiries and in one case stop working with consultants. The reallocation of personnel frees up the employees to be able to provide better service quality to customers that have complex questions while the chatbot is available around the clock to handle more rudimentary questions. In this sense, the benefit of being able to allocate resources can be connected to strategic CRM as it is an area of CRM that focuses on allocating resources in the company to an area in which they would give the greatest benefit to customers and increase their value the most (Buttle & Maklan, 2019, p. 6; Paliouras & Sikras, 2017, p. 24). This is one factor that is greatly beneficial for companies as they can utilize their resources more effectively to provide superior value to their customers through improved service. Company 5 noted that the reallocation of resources led to them being more cost-efficient as even the human service reps could chat with customers through the chat platforms, leading to greater service provided to the customers. Cost efficiency was other than that only brought up by Company 1, as they mentioned that the implementation had reduced costs.

Lead generation through automated technologies was mostly discussed with Company 3 and their MA-system. As they had a separate automated system specifically designed for sales processes, they were able to manage their leads more effectively. This system could generate leads and act on leads automatically based on the information they had about customers in their CRM-system. An automated system, in this case, is capable of personalizing offers when pursuing leads and offering a greater value proposition for customers by personalizing the offer and offering it at the right time through the triggers that activate it.

6.5 Customer Engagement

Customer engagement was one important theme that was brought up in the interviews explicitly when discussing the results of the chatbots utilized by the companies. However, when asked about customer engagement, the interviewees implied that the chatbots could not show any significant increase in customer engagement, although some companies indicated that customers are engaging with the chatbot. The differentiation between "customer engagement" and "customer engaging with" the chatbot are two separate sentiments. In section 3.6 the concept of customer engagement is brought up and it is described as a customer's level of involvement with a firm over time (Buttle & Maklan, 2019, p. 196). A customer's engagement with the chatbot is a way of describing an interaction with the firm's chatbot. Customer engagement can be a way of turning customers into "fans" and in turn creating advocacy for the brand through word-of-mouth marketing, in sense-making customers a "free" source of marketing for the company. According to Sashi (2012), the customer goes through seven phases to reach customer engagement. To evaluate the companies' automated technologies and the impact of customer engagement, it can be evaluated through these steps. If the company has technology that is implemented recently, it could be a matter of the customers not having progressed through the seven phases to reach customer engagement, and they are merely "on their way".

The first two steps: connection and interaction, are two vital steps to reach customer engagement. It would be superfluous to explain the necessity of first connecting and interacting with the company before becoming a “fan” of the company and advocating the brand. Connecting with the company is done through marketing and the customer first discovering the company. The automated technologies of the companies did not facilitate this endeavor, but they did however play an important role in the following phase of interacting with the customers. The chatbot for companies 2, 3, and 4 was present on the landing page for their websites, making the chatbot readily available to handle customers that are just connecting with the company. The chatbots on the companies’ website facilitate the first initial interaction with the company, being able to handle FAQ-questions and other inquiries that the first-time visitor might have about the company. Henceforth, the use of chatbots is facilitating the journey towards customer behavior for the customers by providing a more accessible interaction with the company with a readily available chat.

Satisfaction is one result of the chatbots that was brought up by Company 1 and 4, as they could notice that their customers were satisfied with the solution provided by the chatbots. According to Sashi (2012, p. 262) customer satisfaction is crucial to achieving customer engagement, this is also strengthened by Gustafsson et al. (2005; cited by Sashi, 2012, p. 263) showed a positive effect of satisfaction on retention. The satisfaction of the customers can be derived from the availability of the chatbots, the value proposition by the company, and the quality of the customer service. As for availability, the chatbots can interact with the customers around the clock providing unparalleled availability, given that the customers' questions can be answered by the chatbots. The chatbots' performance when it comes to answering questions is not perfect, as noted by the companies interviewed, but the increasing availability has given indications of customer satisfaction. The value propositions for the customers come in the form of personalized offers based on the data from their CRM-systems. Only Company 3 had an automated system that would follow up on leads, but it is noted by platform providers such as Zlingit, Leadoo, Drift, and Ebbot that their chatbots are capable of lead management. The personalization of offers was present for most companies in their CRM-systems where the information about customers was compiled to create better offers for individual customers. With automated technologies capable of this, it could further increase the value provided to their customers thus increasing satisfaction.

As mentioned in section 3.2, sCRM is a business strategy and a philosophy that can engage customers in a new and collaborative way (Greenberg, 2010, p. 414). The aspect of customer engagement in sCRM relies on the two-way conversations and the collaborative nature of this concept. When it comes to chatbots, they are capable of providing a more conversational aspect of interaction through chat-platforms. However, as mentioned sCRM is largely focused on social media, which leads the authors to merely speculate about the relation between chatbots and sCRM. Although chatbots can create a more conversational interaction in regular CRM-activities, it would require the influx of social media platforms to be able to draw a more reliable conclusion about its connection with sCRM. This was brought up by Zlingit, as their chatbot is capable of integrating with Messenger, however as none of the companies interviewed used chatbots on their social media platforms this connection will remain inconclusive.

7. Conclusions

In this chapter, the conclusion of the study is presented, and the research question is answered. This chapter also includes the implications of the study for practitioners, theoretical development, and society as a whole. Limitations, future research are addressed and the quality, and value of the study, are evaluated through several truth criteria for qualitative research.

7.1 Final Conclusions

The purpose of this thesis was to develop a deeper understanding of how automated technologies are integrated into CRM strategies in today's business context. To fulfill this purpose, along with the sub-purposes, a qualitative study with interviews and secondary data has been conducted. Interviews with companies utilizing chatbots and chatbot-providers have been conducted to collect primary data, and secondary data has been collected from documentary written sources from chatbot-providers' websites. The study aims to answer the following research question:

How are automated technologies, more specifically chatbots, used in existing CRM strategies to further create customer engagement?

From the interviews, it can be concluded that all the companies use CRM systems, some of which are effective, but some of which are outdated. One thing that can be said for sure, is that there is a missing link between the companies' CRM systems and the chatbots being integrated into the CRM-systems. The statistics and data collected from the chatbots should be able to be used with the CRM systems, as explained by the leading chatbot-providers. However, when discussed during the interviews, this is something that the companies do not implement fully. This can either be because of a lack of knowledge in the IT departments of the companies, the misguided information by the chatbot-providers, or it could also be the lack of intelligence in the chatbots.

Chatbots were primarily used in customer service, however, chatbot-providers outlined several other key areas in which their chatbots can be implemented. Though, it can be safe to say that many of these chatbots are still in early implementation phases and can have the opportunity to be implemented more optimally and used within other areas too. Service automation was the primary usage for the chatbots implemented. However, several other areas of usage were outlined by chatbot-providers, namely: HR, IT, marketing, and sales. According to the chatbot-providers, the chatbots should be capable of handling these processes themselves, with the right implementation. If the chatbots were used to their full potential as described by the chatbot-providers, there could be more noticeable results to be seen in the terms of cost-efficiency, resource allocation, customer engagement, and lead generation.

When it comes to customer engagement, it can be argued that automated technologies such as chatbots and MA-systems can lead to customer engagement. It was noted by chatbot-providers that chatbots can create customer engagement. In this study, the companies which use these systems could not answer if it had led to customer engagement. However, automated technologies can lead to customer engagement if it is viewed as a process, as suggested by Sashi (2012). In this case, chatbots and other automated technologies are capable of facilitating the connection and interaction with the company and provide improved value to the customer through better customer service, availability, and improved personalized value propositions. Chatbots can handle simple customer questions, thus providing quick service available around the clock, and allows the company to allocate personnel to handle more complex customer inquiries. These factors are part of the initial phases in Sashi's (2012) Customer Engagement Cycle that eventually leads to customer engagement.

7.2 Theoretical Contributions

One theoretical contribution of this thesis is that it has further developed an understanding of how companies are integrating automated technologies in their CRM-operations. This thesis provides the view of chatbot-providers as a more optimistic view that tells us that automated technologies have a larger role to play when it comes to facilitating companies' CRM-operations, by integrating chatbots in more business processes. This has implications for research in the field of CRM as it further develops an understanding of how companies can work with CRM by automating support-and central processes.

The concept of social CRM, or conversational marketing, is another field in which this thesis makes a theoretical contribution. Social CRM has not been studied yet in the context of chatbot technologies, so this thesis contributes by showing that the conversational aspect of interacting with customers is still possible with automated technologies. As the findings show, the companies are working with personalizing offers for their customers to create mutual value for themselves and their customer base. This is one crucial aspect of sCRM, to make interactions and relationships with customers more personal. This finding has implications on research within sCRM, as it shows a connection between sCRM and automated technologies. This may lead to further research as this was not the primary purpose of this thesis.

This thesis has investigated automated technologies', mainly chatbots, the capability to create customer engagement. This is done through connecting the capabilities and performance of the chatbot to the customer engagement cycle by Sashi (2012) and showing that by facilitating the initial steps on the customer engagement cycle it can lead to more engagement through the interactions and subsequent satisfaction. This has implications on the field of customer engagement, as it shows that customer engagement can be facilitated through automated technologies, without the necessity of human connection in customer contacts. However, this result is only half-way there, as it needs further research to investigate the remainder of the customer engagement cycle by looking further into the point of view from the consumers who engage with these technologies.

7.3 Practical Implications

As explained earlier in the paper, chatbots have been mostly researched along with customer service beforehand. How customers perceive the help from chatbots with customer inquiries, user-friendliness, perceived helpfulness, etc. (Chung et al., 2018; Følstad et al., 2018; Xu et al., 2017). Since the focus of chatbots has been to assist customers with different inquiries, naturally, the perspective of chatbots within marketing has been a lesser focus area. Whilst this subject is quite new at hand, it is still a very interesting area that can be further delved into. Where once chatbots were only used for assistance, they can and should be used by companies for lead generation and personalized advertising. More cost-effective solutions can be found where staff can be allocated to other more complex tasks. The perspective the chatbot-providers have on chatbots capabilities and the perspective of the companies using chatbots differs. Whilst the chatbot-providers see the chatbots being implemented fully with companies CRM systems, the companies themselves do not see the capability or do not know how to do this. In practice, it would be recommended that the companies using chatbots should delve deeper into the chatbot's capabilities and integrate the chatbots further into the CRM systems.

By doing so, cost efficiencies and re-allocating of resources such as staff could be implemented. Moreover, the chatbot-providers too could use this knowledge to better educate companies on how to use their chatbot platforms more efficiently and integrate the chatbots fully to the CRM systems. It can be safe to say that the potential of chatbots as remarked by the chatbot-providers can be used within more aspects than just customer service. Especially considering the availability when using chatbots, since they can be implemented around the clock on websites and other platforms such as on social media. As pointed out by Zlingit, most people today use social media, and therefore should chatbots be implemented further into these kinds of platforms. Therefore, it is recommended that companies using chatbot platforms educate themselves more about how these technologies can be better integrated into the whole company. Right now, is this technology used mostly within customer service, but, by integrating more departments within the company to chatbots, such as marketing, sales, HR, the use of these platforms can increase. As well, the chatbot-providers should stress the potential of the chatbots to their customers, as there is an evident link missing. By increasing the personalization of their service to companies, the usage of chatbots can increase further.

7.4 Societal Implications

The usage of automated technologies has some implications for consumers. Chatbots and AI handling personal information must be carefully developed to ensure that personal information is handled with the utmost confidentiality. It was brought up by companies in the interviews that their chatbots are available after a customer has identified themselves with BankID to ensure that the information handled does not leak to anyone unauthorized. Consumers interacting with chatbots could also be prone to deception in the case where it is not clear that they are talking to a chatbot and not a human on the other side of the chat. This could lead to customers feeling deceived and some trust issues with the company may surface.

Another aspect of societal implications, as well as practical, is the expectations and how people interact with chatbots. People can have different expectations in performance, ability to solve problems, and personal connection when it comes to interacting with humans vs. chatbots. If the customer or company is not aware of the different expectations it could create some mismatch in the expected service received by the customer leading to a dissatisfied customer.

7.5 Limitations and Future Research

This study, like many others, is not perfect and has its limitations. One limitation of the study is the broad range of subjects that was being investigated. This became a problem when it came to data collection as the participants in the interview had limited knowledge of all aspects of the subjects being investigated. In some cases, the interviewee was an expert on how the company works with CRM and not so familiar with the specifics of the chatbots technology used in the company or the other way around. This limitation led the authors to pursue more interviews to achieve more richness in the data about all the topics investigated in the study. A second limitation is an externality that led to some complications in the data collection process, more specifically in finding participants for the study. The COVID-19 pandemic has affected businesses all around the world and organizations are restructuring, managing employees and resources to avoid bankruptcy, therefore many companies which were contacted for potential interviews declined due to various reasons or simply did not respond to emails and phone calls. However, the COVID-19 pandemic has affected everyone, not just the authors, therefore this is a limitation that was unavoidable for this thesis.

A third limitation is the differencing nature of the companies' customer relationships. The nature of the relationship with the customers for the companies ranged from short-term to long-term, for instance, companies in the energy sector usually maintain very long contracts with their B2C-customers, while a company in the transportation sector might have a very transactional and short-term relationship with some customers. The difference in how companies work with CRM implies different interactions with their customers.

This study has opened up several avenues for future research. One thing that has become clear when interviewing companies, chatbot-providers, researching automated technologies, etc., is that automated technologies are versatile in the platforms, business operations, and implementation. As the companies interviewed predominantly hosted their chatbots on their website, it would be interesting to investigate chatbots that are implemented in already existing chat-platforms, such as social media platforms. It was noted by Zlingit in the interviews that they want to reach customers where they are situated and remarked that people are communicating through chats such as Messenger more than they are checking their emails. Therefore, it would be interesting for future research to investigate how chatbots on platforms like Messenger, WhatsApp, WeChat, etc. can improve customer engagement even further.

The usage of social media technologies also opens up for further research within social CRM. This study has made contributions in the field of sCRM as it shows that chatbots can be integrated to create more conversational, personal interactions between customers and the company. However, as the chatbots investigated are located on company websites, it could be interesting to investigate further into chatbots on social media platforms.

This study has looked into chatbots' potential to create customer engagement, but from a perspective of businesses, both B2C companies and chatbot-providers. To find out more about customer behavior and to look further into customer engagement it would be fascinating to research this from the perspective of the customer who engages with the chatbots. Such research would complement the view of the companies investigated by this thesis and generate a more complete view of chatbots' ability to create customer engagement. Also, from the perspective of the consumers, it could be interesting to look into the perceived usefulness and the attitude towards automated technologies, specifically chatbots. From this perspective, it could also look into how people interact with chatbots and if it differs from how they would interact with a human in the same setting. This is an interesting area as it could also look into the different expectations people have on humans vs. chatbots in a customer service setting.

Another avenue for future research related to this study is to conduct a case study from the perspective of one company to get a more comprehensive view of how automated technologies can improve the performance of a business, create customer engagement, and facilitate CRM-activities. As this study has interviewed several companies it was not possible to get a comprehensive understanding of how these technologies function within a company. A case study could provide a more in-depth view of how companies integrate automated technologies in their CRM-activities and how chatbots are integrated and utilized.

Through this research, a new perspective on chatbots can be seen, by shifting from a service-centric focus to a marketing focus, further research areas can be noted. The potential of chatbots within a company's strategy is broader than it seems.

7.6 Truth Criteria

Reliability and validity are two terms that are of huge value for quantitative researchers to establish and assess the quality of their research. However, these concepts are hard to modify to qualitative work since their focus is on the measurement methods and the thing being measured (Stenbacka, 2001, p. 551). This is something that is not of much focus in qualitative work. The standard definitions of these concepts need to be modified to better suit qualitative work, or altogether, re-introducing new concepts that better encompasses the relevance of qualitative studies (Golafshani, 2003; Bryman & Bell, 2011, p. 394).

Stenbacka (2001, p. 552) explains: *"It is obvious that reliability has no relevance in qualitative research, where it is impossible to differentiate between researcher and method. The basic distinction that makes reliability irrelevant is the notion of "measurement method", which is not relevant in qualitative research.".* For qualitative work to have high reliability the quality of the work needs to be high and generate great understanding. That a thorough description of the entire process, enabling intersubjectivity the relations between humans are the main factors of what indicates good quality when using a qualitative method (Stenbacka, 2001, p. 552).

As well, the basic question of validity is if the intended object which should be measured is really measured. The purpose of qualitative research never is to measure anything and therefore is this concept too, not relevant for qualitative studies (Eneroth, 1984). It can therefore be clearly stated that these concepts are ineffective for assessing the quality of this research paper. Instead, some authors argue that qualitative studies should be evaluated according to quite different criteria. Lincoln and Guba (1985; cited by Bryman & Bell, 2011, p. 395) present an alternative to reliability and validity. They propose two criteria: trustworthiness and authenticity, to assess qualitative work. Trustworthiness is made up of four sub-criteria: credibility, transferability, dependability, and confirmability.

Credibility stresses the use of good practice and that the social world has been studied correctly by the authors (Lincoln & Guba,1985; cited by Bryman & Bell, 2011, p. 396). This social world needs to be accepted by the people being a member of this social world. To understand the social world and the context surrounding the data collected, both the authors have re-read the transcribed data several times to get a deeper understanding of the interviewee's perspective on the matter at hand. As well, the research practices for this study has followed what the authors think are canons of good practice. The paper will as well be submitted to each of the participants in the interviews to make sure that their answers are not misjudged in anyways. Therefore, it is argued that the data presented is accurately representing the social reality of the research context. Furthermore, the credibility of the secondary data collected must be evaluated. The authors have been careful with the usage of secondary data given its nature of being documentary written sources from the companies' websites. The sources can be seen as marketing material as it is present on the companies' websites and has been used with this in mind. The secondary data has been used sparingly and in relation to the primary data recorded to ensure relevance.

Transferability is about how the findings of one study can be transferred to another climate (Lincoln & Guba,1985; cited by Bryman & Bell, 2011, p. 398). Since qualitative research is unique and contextual, it is important to collect rich information on culture. Since this can help others to assess whether or not the transferability to another environment is possible (Lincoln & Guba,1985; cited by Bryman & Bell, 2011, p. 396). Since this study is highly contextual the results from this paper are hard to transfer to other situations. This paper is orientated towards contextual uniqueness and importance in the specific social worlds. Therefore, is it not important that the transferability, in this case, is high.

Dependability can be compared to the quantitative term reliability, which refers to the degree to which a study can be replicated. To ensure the main goal of trustworthiness, the researchers need to keep all the records and data from the whole research process. Examples of this could be data transcripts, notes, problem formulation, selection of participants, etc. (Lincoln & Guba,1985; cited by Bryman & Bell, 2011, p. 398). In the research process of this study, all the documents and transcriptions are kept to ensure the trustworthiness and the ability to repeat the process if it would have been needed. For example, if the empirical findings would have not sufficed or if any technical malfunctions would have made it so that the study needed to be replicated. All the research steps taken can be viewed in the methodology chapters. By collecting rich data and keeping all the records, readers can deem to evaluate if this study has the possibility of transferability to other contexts.

Confirmability is about how the researchers can show that they have acted in good faith, that no personal feelings have been allowed to alter the conduct of the research and findings deriving from it (Lincoln & Guba,1985; cited by Bryman & Bell, 2011, p. 398). The authors have written as much as possible about each step of the process and explaining all the relevant frameworks so that the transparency of the work is as high as possible. If any personal judgments have been presented, they have clearly been expressed that they are personal opinions of the authors.

Authenticity, which is the second main criteria presented, raises the issues of the political impact that the research has. It stresses many impacts of the research: represent accurately different viewpoints of members in the social setting, helping members to better understand the social climate being researched, helping appreciate the perspective of other members, etc. (Lincoln & Guba,1985; cited by Bryman & Bell, 2011, p. 398-399). The authors have tried their utmost best to explain the different viewpoints from the chatbot-providers and the companies using the chatbots. However, as Bryman and Bell (2011, p. 399) state, the authenticity criteria have not been as influential in qualitative research and therefore have not been in focus as much as the other criteria.

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Appendix 1 – Interview Guide 1

Interview guide for companies that have implemented chatbots

Opening/Background Questions:

- Can this interview be recorded?
- What is your name?
- How long have you worked at the company?
- What is your position and area of responsibility?

sCRM

- How do you work with customer relationship management?
- Do you work with social CRM?
- How are you integrating sCRM into your company?
- What platforms/channels do you use for interacting with your customers? (FB, Twitter, Instagram, etc.)
- What tools do you use to manage your customer relationships? (Software/databases)

Social Media Marketing

- How do you interact with customers on social media?
- How does your company manage brand content on social media?
- Do you use any automated technologies with social media marketing?

Chatbots and Customer Engagement

- What is your perception of chatbots and AI in a business context?
- Do you use automated technologies such as chatbots or AI in CRM?
    - In which processes are they used? How are they used? (Salesforce, customer service, marketing)
- Is there a notable impact of chatbots on customer engagement?
- Has it changed how you interact with customers?

Results, Chatbots vs. Before

- Can any changes be seen from using chatbot technology?
    - Cost Efficiency
    - Customer Engagement
    - Lead generation
    - Resource Allocation

Closing Questions

- Is there something about how your company works with sCRM and chatbots that we have failed to address?
- Is there something else you would like to clarify or further discuss?

Appendix 2 – Interview Guide 2

Interview with chatbot providers

Opening/Background Questions:

- What is your name?
- When was the company founded?
- Could you tell us more about what your company does for its customers?
  - Why do customers seek out your service?
  - What is your/the company's view on conversational marketing?
- What kind of organizations do you work with?

Chatbots

- What purpose do the chatbots serve?
- In what areas of a business can chatbots be useful/less useful?
- How do you implement chatbots for customers?
- What results can be seen from using these chatbots?
- How do chatbots affect customer engagement?
- How do chatbots affect customer relationships?

Closing Questions:

- Is there something about how your company works with chatbots that we have failed to address?
- Is there something else you would like to clarify or further discuss?

Appendix 3 – Mail template that was sent out to companies

Hej!

Vi är två mastersstudenter vid Umeå Universitet och vi skriver just nu vår masteruppsats inom marknadsföring. Vi vill gärna undersöka hur företag jobbar med customer relationship management (CRM) via olika plattformar och teknologier, mer specifikt chatbots, AI eller andra automerade verktyg. Vi vill skapa en djupare förståelse för hur företag arbetar med kundvård via nya teknologiska verktyg och plattformar.

Som vi har förstått via era tjänster så använder ni er också av liknande verktyg i kundtjänst och andra tjänster. Ifall ni skulle vara intresserade av att ställa upp, så är vi ute efter en kvalitativ intervju som inte borde ta mer än en halvtimme. Vi är flexibla och kan helt anpassa oss efter tider som passar er.

Självklart så kommer vi ta etiska forsknings principer i åtanke och deltagare är anonyma, samt företagsnamn om så önskas.

Vi ser fram emot ert svar och förhoppningsvis en intervju. Ifall ni har några frågor angående oss eller uppsatsen vi skriver så är det bara att höra av sig med frågor.

Med vänliga hälsningar,
Axel Holmner Härgestam & Paul Edlund, Umeå Universitet

[English]

Hi!

We are two master's students at Umeå University, and we are currently writing our master's thesis in marketing. We would like to investigate how companies work with customer relationship management (CRM) through various platforms and technologies, more specifically chatbots, AI, or other automated tools. We want to create a deeper understanding of how companies work with customer care through new technological tools and platforms.

As we have understood through your services, you also use similar tools in customer service and other services. If you are interested in taking part, we are looking for a qualitative interview that should not take more than half an hour. We are flexible and can fully adapt to times that suit you.

Of course, we will take ethical research principles in mind, and participants are anonymous, as well as company names if desired.

We look forward to your response and hopefully an interview. If you have any questions about us or the essay we are writing, just ask for questions.

Sincerely,

Axel Holmner Härgestam & Paul Edlund, Umeå University

Appendix 4 – LinkedIn Post

Hej!

Vi är två mastersstudenter vid Umeå Universitet och vi skriver just nu vår masteruppsats inom marknadsföring. Vi vill gärna undersöka hur företag jobbar med customer relationship management (CRM) via olika plattformar och teknologier, mer specifikt chatbots, AI eller andra automerade verktyg. Vi vill skapa en djupare förståelse för hur företag arbetar med kundvård via nya teknologiska verktyg och plattformar. Ifall ni skulle vara intresserade av att ställa upp, så är vi ute efter en kvalitativ intervju som inte borde ta mer än en halvtimme. Vi är flexibla och kan helt anpassa oss efter tider som passar er.

Självklart så kommer vi ta etiska forskningsprinciper i åtanke och deltagare är anonyma, samt företagsnamn om så önskas.

Gilla och Dela gärna detta inlägg!

Med vänliga hälsningar,

Axel Holmner Härgestam & Paul Edlund, Umeå Universitet

[English]

Hi!

We are two master's students at Umeå University, and we are currently writing our master's thesis in marketing. We would like to investigate how companies work with customer relationship management (CRM) through various platforms and technologies, more specifically chatbots, AI, or other automated tools. We want to create a deeper understanding of how companies work with customer care through new technological tools and platforms. If you are interested in setting up, we are looking for a qualitative interview that should not take more than half an hour. We are flexible and can fully adapt to times that suit you.

Of course, we will consider ethical research principles, and participants are anonymous, as well as company names if desired.

Like and Share this post!

Sincerely,

Axel Holmner Härgestam & Paul Edlund, Umeå University