

The Impact of Video-Clip Instructions on Perceived Ease of Use and Perceived Usefulness of Customer Relationship Management (CRM) Software

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ABSTRACT

The purpose of this research is to determine whether video-clip instructions have an impact on perceived ease of use and perceived usefulness of customer relationship management (CRM) software for brand management. The result shows that although there is no significant difference in perceived ease of use and perceived usefulness with or without the instruction videos, students perceive Microsoft Dynamics CRM software to be very easy to use and very useful for brand management. The study also finds that a cross-discipline curriculum will benefit student learning about CRM software. Finally, this paper suggests future studies to explore pedagogical methods to enhance students' learning about how to use Enterprise System software for brand management.

Keywords – customer relationship management (CRM) software, CRM training, business process management, ERP training, brand management

INTRODUCTION

Customer relationship management (CRM) software is a software system specifically designed for salespersons to handle customer relationships. One of the purposes of CRM is to identify, acquire, and retain customers by keeping complete and accurate customer information. The popular customer relationship management software systems include Salesforce.com, SAP CRM, and Microsoft Dynamics CRM. CRM is a separate system from most enterprise resource planning (ERP) systems.

Like ERP systems, CRM evolved from a range of stand-alone systems including accounting, production, supply chain management, sales force automation systems, and order management. In the last decade, some organizations attempted to consolidate some of these disparate systems/technologies. Whether customers communicate with the organization by telephone, e-mail, Internet, wireless hand-held computers, or face-to-face, CRM is able to track and manage a consistent dialogue that includes valuable customer information (Buttle, 2003). The sales growth rates for CRM applications exceeded 50% for most of the 1990s-2000s with expenditures on CRM expected to exceed \$11 billion in 2010 (Sim, 2007; Musico, 2009). Popular CRM systems include SAP, Oracle

Siebel, Salesforce.com. However, SAP and Oracle are designed for large companies. Microsoft has successfully created a CRM software named Microsoft Dynamics CRM (see <http://crm.dynamics.com/en-us/home> and Figure 1). Microsoft Dynamics CRM is known as one of the best CRM packages for small businesses.

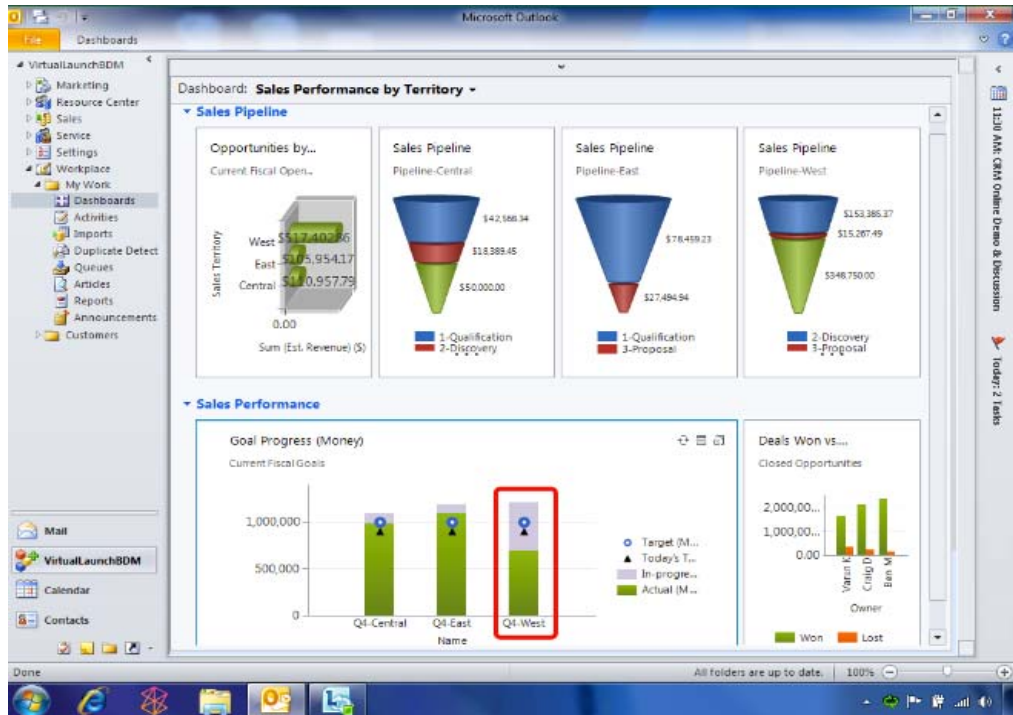


Figure 1. A Screenshot of Microsoft Dynamics CRM

While CRM software is important for sales automation, marketing analysis, and brand management, universities are slowly adopting CRM in their curriculum. Many instructional methods have been proposed for learning ERP or CRM systems including a simulation game (Leger, 2006), a case study (Cannon et al., 2004), and video-clip instructions, but only a few studies have discussed the empirical results of these instructional methods. Therefore, the purpose of this paper is to investigate the impact of video-clip instructions on perceived ease of use, and the usefulness of CRM software on brand management.

LITERATURE REVIEW

Many business and IS journals have paid attention to CRM in areas of adoption, implementation, and usefulness to business. Vella and Caruana (2012) cite perceived usefulness and perceived ease of use as key elements that are critical in the employees and companies' intention to use CRM systems. Their study results indicate that 'the higher the perceived ease of use, the greater the perceived usefulness and the higher the intention to use CRM.' However, they add that 'the major research limitation of this study is limited to a single entity and consequently the results should be generalized with caution. But one of its implications of this study is that management to devote adequate resources toward developing perceived usefulness and perceived ease of use so the resistance to use CRM will be minimized.'

Hendricks, Singhal, and Stratman (2007) studied the effect of investments in three different enterprise systems (ES): Enterprise Resource Planning (ERP), Supply Chain Management (SCM), and Customer Relationship Management (CRM) systems, on a company's long-term stock price performance and profitability measures. Their 'analysis of the financial benefits of these implementations yields mixed results.' 'On average, adopters of SCM system experience positive stock returns as well as improvements in profitability. There is no evidence of improvements in stock returns or profitability for firms that have invested in CRM.' Although their results are not

uniformly positive across the different enterprise systems, ‘they are encouraging in the sense that despite the high implementation costs, we do not find persistent evidence of negative performance associated with ES investments. This should help alleviate the concerns that some have expressed about the viability of ES given the highly publicized implementation problems at some firms.’ The future trends for CRM and brand management are social CRM (Woodcock, 2011), business intelligence/analytics, and big data implementation in brand management.

VIDEO-CLIP INSTRUCTIONS IN MICROSOFT DYNAMICS CRM

Microsoft Dynamics provides a series of video clips for learning CRM concepts. After logging into CRM main screen, one chooses “Resource Center” under the main menu (see Figure 2). The Resource Center contains 27 different video clips for the following topics: 1) get started, 2) configure and customize, 3) get data into Microsoft Dynamics CRM, 4) optimize productivity, 5) improve customer service, and 6) reach out to your customers.

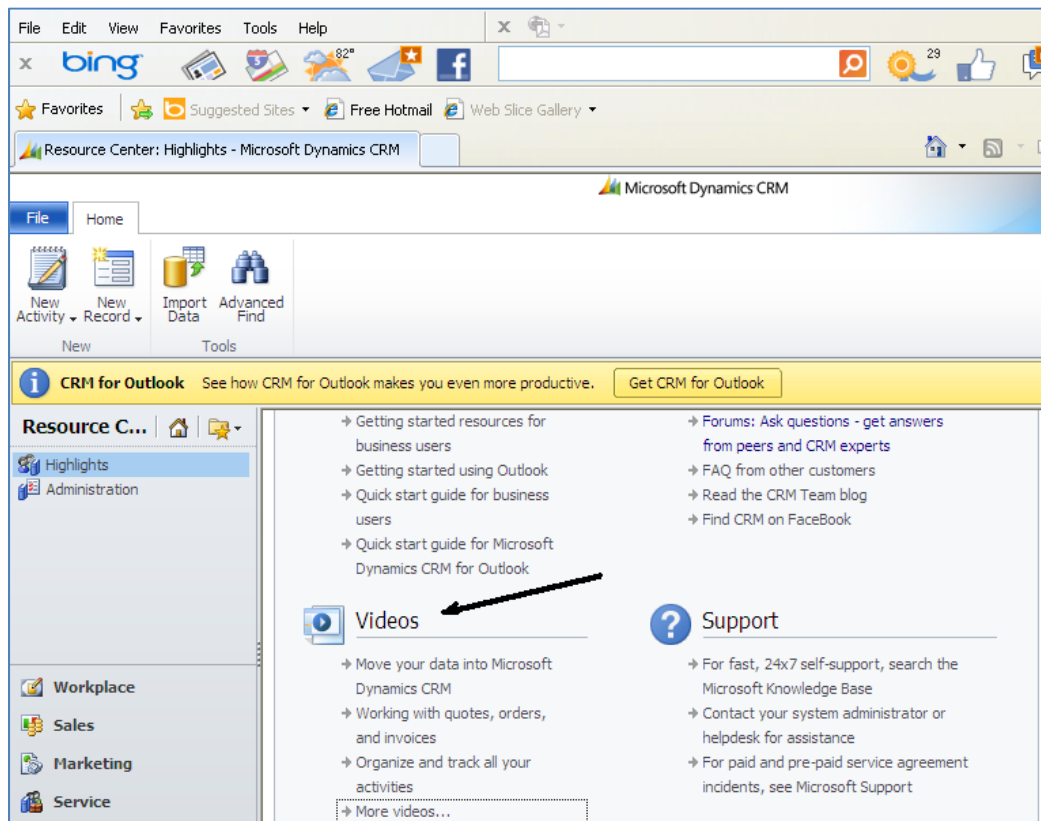


Figure 2. Resource Center on the Microsoft CRM software

Those who have not purchased CRM can watch these videos on the CRM website. The following video-clip instructional links are examples of video clips available on the web:

1. Sales automations (<http://crm.dynamics.com/demos/salesautomation/default.html>)
2. Customer Services (<http://crm.dynamics.com/demos/customerservice/default.html>).

Each video is about eight minutes long, which is a good length for instructors to use in a classroom setting. The first video above uses a scenario to show how to drive sales productivity by: 1) tracking sales opportunities, 2) obtaining timely approvals, 3) updating customer quotes, and 4) reaching quarterly goals. In the case presented in the scenario, the sales representative uses a dashboard (see Figure 1) to monitor sales performance and finds that the sale is below the quarterly goal. The sale representative then checks whether there are any pending sales in the pipeline. In the scenario case, the opportunities show that there is a big sale in the final negotiation stage but the

customer insists a 10% discount. The sales representative uses instant messaging to get approval from the sales manager (see Figure 3) and gets back to the customer's negotiation. Other tools in CRM include mail merge and connection to SharePoint.

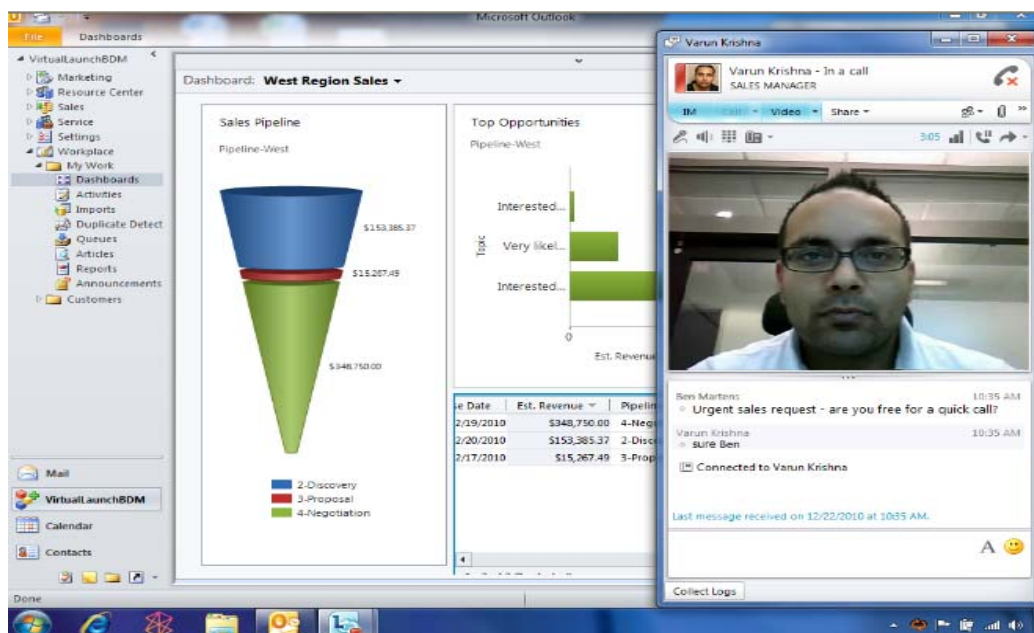


Figure 3. Instant Messengers to Get Approval from the Upper Manager

RESEARCH HYPOTHESIS

The instructional videos demonstrate CRM software in real usage situation. Without giving into detailed mechanical instructions, the instructional videos demonstrate how to use CRM software to perform each customer relationship management function. The software provides a visual roadmap for the new users. Therefore, we hypothesize that

Hypothesis 1.1:

Showing the video clip increases students' perception of ease in learning Microsoft CRM software.

Hypothesis 1.2:

Showing the video clip increases students' understanding of Microsoft CRM software's effect on brand management.

CRM is not only an enterprise system but also a marketing concept. It requires the users to have competencies in brand management as well as management information systems. Sales personnel may come from different disciplinary backgrounds. Therefore, the company may hire a diversified group of people to use the CRM software. Sales personnel's understanding of CRM software usage and marketing management is crucial in making full use of the software. Students with a business background are better equipped with brand management concepts than students with a non-business background. They will be able to associate the marketing concepts with those functions in the CRM software. Therefore, we hypothesize that

Hypothesis 2:

Students' major will influence their evaluation of Microsoft CRM software's effectiveness in marketing management. More precisely, students in business- related majors will better appreciate the software's effect on brand management than non-business major students.

Hypothesis 3:

Gender will not influence students' Microsoft CRM software perceived ease of use.

RESEARCH METHODOLOGY

To test these research hypotheses, we conducted an experimental study which employed Microsoft Dynamics CRM as the CRM software. Microsoft Dynamics CRM is one of the major CRM software packages in the market today, especially for small and medium-sized businesses. Table 1 shows there is no one dominant CRM software in the market today while Microsoft Dynamics CRM is among the top four vendors. Microsoft Dynamics CRM also provides educational support for universities and colleges: thus we chose Microsoft Dynamics as the CRM software for this experiment. Student samples were collected from two universities in Michigan and in Mississippi. The students were semi-randomly assigned to two groups. One group was shown the instructional video clips before group members learned about how to use Microsoft CRM software; the other group was not shown the instructional video clips and was given instructions to experience the CRM software after only a brief introduction of the functions of the software. Both groups were asked how the CRM software impacts eight major brand functions: competitive analysis, client information management, client relationship management, brand management, brand image management, product management, pricing management, and promotion management. Both groups were also asked how they perceive the ease of use of the CRM software. Students' profile data were also collected including major and gender.

Vendor	2008 Revenue	2008 Market Share (%)	2007 Revenue	2007 Share (%)	2007-2008 Growth (%)
SAP	2,055	22.5	2,072	25.5	-0.8
Oracle	1,475	16.1	1,320	16.2	11.8
Salesforce.com	965	10.6	676	8.3	42.7
Microsoft	581	6.4	332	4.1	75
Amdocs	451	4.9	419	5.2	7.6
Others	3,620	39.6	3,311	40.7	9.3
Total	9,147	100	8,130	100	12.5

Source: Gartner (2009)

Table 1. Market Share of CRM Software

Eight items were created to measure different aspects in brand management (Table 2). And, three items were created to measure the perceived ease of use of Microsoft CRM software (Table 3).

After eliminating non-response samples 336 samples were subjected to data analysis. Of those in the sample, 109 students were not showed the video clip and 227 students were showed the video clip before using the CRM software. Of those in the sample, 169 were business majors: 167 were non-business major. 173 were male and 163 were female. SPSS was used to analyze the data. A two group t-test with independent sample analysis was performed to test the main effect of the instructional video and the student major at confidence level of 95%.

Brand Management Functions	<u>Strongly Disagree</u> <u>Strongly Agree</u>						
	1	2	3	4	5	6	7
1) Microsoft Dynamics CRM Online is valuable for competitive analysis.	1	2	3	4	5	6	7
2) Microsoft Dynamics CRM Online is valuable for sales managers to manage clients' information.	1	2	3	4	5	6	7
3) Microsoft Dynamics CRM Online is a valuable software for brand management in general.	1	2	3	4	5	6	7
4) Microsoft Dynamics CRM Online is helpful for managers to develop a good relationship with their clients.	1	2	3	4	5	6	7
5) Microsoft Dynamics CRM Online is valuable for brand image management.	1	2	3	4	5	6	7
6) Microsoft Dynamics CRM Online is valuable for product management.	1	2	3	4	5	6	7
7) Microsoft Dynamics CRM Online is valuable for making pricing decisions.	1	2	3	4	5	6	7
8) Microsoft Dynamics CRM Online is valuable for making promotion decisions.	1	2	3	4	5	6	7

Table 2. Eight Items Brand Management Function Measurement for Microsoft Dynamics CRM

1). Microsoft Dynamics CRM Online is easy to use.	1	2	3	4	5	6	7
2). Microsoft Dynamics CRM Online can enhance my learning experience in the classroom.	1	2	3	4	5	6	7
3). Overall speaking, I find Microsoft Dynamics CRM Online interesting to use.	1	2	3	4	5	6	7

Table 3. Three Items Perceived Ease of Use Measurement for Microsoft Dynamics CRM

RESULTS AND DISCUSSIONS

Hypotheses 1.1 and 1.2

The result shows that generally speaking, the users are very favorable about the software in terms of its impact on all eight brand management functions and perceived ease of use. The means range from 4.84 to 5.55 out of a 7-point scale. However, there is no significant difference between the groups with and without the instructional video clip being shown prior to learning about the Microsoft CRM software. Table 4 summaries the means of the two groups.

Brand Management Functions		N	Mean
Microsoft Dynamics CRM Online is valuable for competitive analysis.	Without	109	5.22
	With video	227	5.31
Microsoft Dynamics CRM Online is valuable for sales managers to manage clients' information.	Without	109	5.55
	With video	227	5.50
Microsoft Dynamics CRM Online is a valuable software for brand management in general.	Without	109	5.27
	With video	227	5.23
Microsoft Dynamics CRM Online is helpful for managers to develop a good relationship with their clients.	Without	109	5.24
	With video	227	5.35
Microsoft Dynamics CRM Online is valuable for brand image management.	Without	109	5.12
	With video	227	5.11
Microsoft Dynamics CRM Online is valuable for product management.	Without	109	5.19
	With video	227	5.38
Microsoft Dynamics CRM Online is valuable for making pricing decisions.	Without	109	5.17
	With video	227	5.13
Microsoft Dynamics CRM Online is valuable for making promotion decisions.	Without	109	5.45
	With video	227	5.19
Perceived Ease Of usage		N	Mean
Microsoft Dynamics CRM Online is easy to use.	Without	109	4.84
	With video	227	4.94
Microsoft Dynamics CRM Online can enhance my learning experience in the classroom.	Without	109	5.13
	With video	226	5.15
Overall speaking, I find Microsoft Dynamics CRM Online interesting to use.	Without	109	5.17
	With video	226	5.19

Table 4. Survey Results of With Video vs. Without Video

Hypothesis 2

In general, all students' evaluations on the software's influence on brand management functions are very positive. The means range from 5.07 to 5.73 on a 7-point scale. However, two brand management functions show significant difference between students with business majors vs. non-business majors. These two items are

“competitive analysis” and “manage clients’ information.” It is sufficient to say that the software users’ understanding of brand management will help in their usage evaluation. The result supports the hypothesis and is shown in Table 5.

Brand Management Functions		N	Mean
Microsoft Dynamics CRM Online is valuable for competitive analysis.	Non-Business	167	5.12*
	Business	169	5.44*
Microsoft Dynamics CRM Online is valuable for sales managers to manage clients’ information.	Non-Business	167	5.31*
	Business	169	5.73*
Microsoft Dynamics CRM Online is a valuable software for brand management in general.	Non-Business	167	5.20
	Business	169	5.28
Microsoft Dynamics CRM Online is helpful for managers to develop a good relationship with their clients.	Non-Business	167	5.20
	Business	169	5.43
Microsoft Dynamics CRM Online is valuable for brand image management.	Non-Business	167	5.14
	Business	169	5.09
Microsoft Dynamics CRM Online is valuable for product management.	Non-Business	167	5.30
	Business	169	5.34
Microsoft Dynamics CRM Online is valuable for making pricing decisions.	Non-Business	167	5.07
	Business	169	5.22
Microsoft Dynamics CRM Online is valuable for making promotion decisions.	Non-Business	167	5.14
	Business	169	5.41

* significant at .05 level.

Table 5. Survey Results of Perceived Brand Management Usefulness by Business Major vs. Non-business Major

Hypothesis 3

As predicted, there is no significant difference between male and female students in their perception toward ease of use of the software. However, female students seem to be more likely to agree that the software programs have an effect on brand image management (See Table 6).

		N	Mean
Microsoft Dynamics CRM Online is valuable for brand image management.	Female	163	5.27*
	Male	173	4.97*
Microsoft Dynamics CRM Online is easy to use.	Female	163	4.83
	Male	173	4.98
Microsoft Dynamics CRM Online can enhance my learning experience in the classroom.	Female	163	5.23
	Male	173	5.07
Overall speaking, I find Microsoft Dynamics CRM Online interesting to use.	Female	163	5.01
	Male	173	5.34

Table 6. Female Perceptions vs. Male Perceptions towards Microsoft Dynamics CRM

CONCLUSIONS AND IMPLICATIONS

This research is an exploratory study about the effect of the video instructions for Microsoft Dynamics CRM on perceived ease of use and perceived brand management usefulness. While there is no statistical difference, video-clip instructions generally help the students understand CRM software. Several reasons can explain the results.

One of the reasons is that we allow students to watch the instructional video only for a short time period. We suspect that students need to watch the video several times before they can fully understand the functions. Future study may investigate the time required for users with different backgrounds.

Second, the managerial function we investigated in this study is brand management. However, the major function of CRM software is for sales teams to manage client relationships. Brand management involves more sophisticated mining of the data collected from CRM software. Future study may focus on investigating the relationship between CRM software and perceived usefulness of specific customer relationship management functions.

Future study may also explore other Microsoft software that deals with brand management. For example, Figure 4 shows the relationships among CRM software, database, and business intelligence/data mining/data analytical software, and brand management. For Microsoft Dynamics CRM, the data base is Microsoft SQL Server 2008. Microsoft SQL Server 2008 provides a tool called the Business Intelligence Development Studio. The Business Intelligence Development Studio has different data analytical tools such as regression analysis, cluster analysis, naïve Bayes, and many other statistical/mathematical tools (see Figure 5). Future studies may focus on how business intelligence software can retrieve data from a CRM data warehouse and perform market analysis to enhance brand management functions.

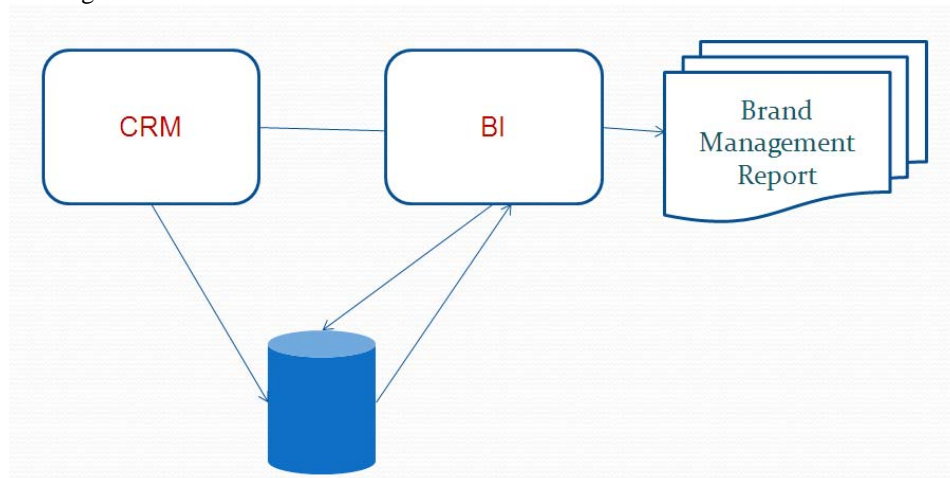
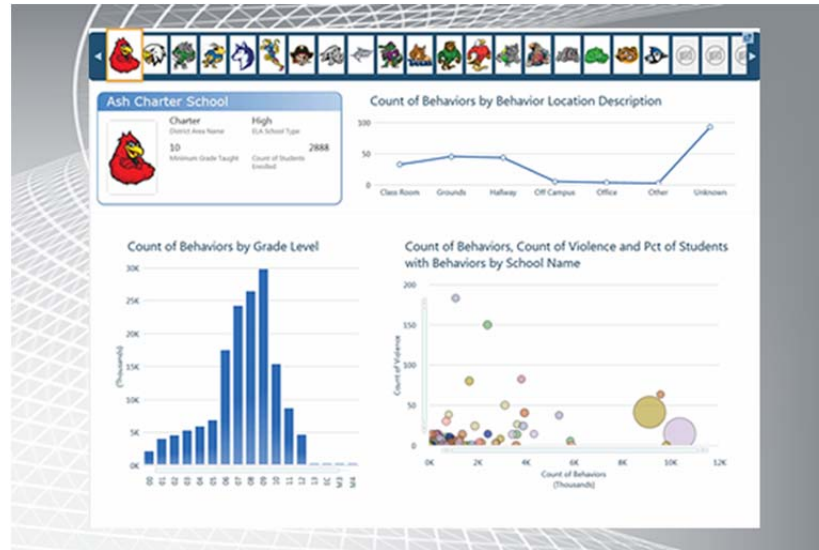


Figure 4. The Relationship among CRM, BI, and Brand Management



Source: <http://www.microsoft.com/sqlserver/en/us/solutions-technologies/SQL-Server-2012-business-intelligence.aspx>

Figure 5. Business Intelligence Development Studio

Digital technology enables enterprises to access and manage marketing data in an unprecedented way. It calls for a cross-discipline competency for corporate users as well as for individual users. Traditionally, CRM software courses have been offered in MIS departments. This study finds that students with brand management backgrounds can better appreciate the usefulness of CRM software. The managerial implication is that CRM software should be integrated with a sales component of brand management in the classroom to enhance students' learning experience and to better prepare them to be competent users of CRM software.

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1. How does Microsoft CRM help a company to improve operational efficiencies and contain costs?
2. How does Microsoft CRM help a company to deepen business insight?

III. Social Media and Microsoft Dynamics CRM

Answer the following questions and provide one screen shot to prove that you have watched the video.

http://www.ignify.com/dynamics_CRM_Social_Media_accelerator.html

1. What social media are used with Microsoft CRM in this video?
2. When you see the screen for Social Network Contact, you will see 'influence.' What is influence?
3. What reports are mentioned in this video?

Appendix B. Research Consent Form

Dear student:

You are invited to participate in a marketing research project on Microsoft Dynamics CRM Online Evaluation.

Today you will be asked to work on Microsoft Dynamics computer software and take a 10-minute long survey to assess your attitude toward CRM Online evaluation.

All the questions are about Microsoft Dynamics CRM Online Evaluation. There are also some questions about your demographic information, but not your personal identity information such as name or student ID.

How is your data kept confidential?

You will never be identified, by name or by other identifying characteristics, in any publications or papers that result from this study. There are no foreseeable risks to you from participation in this study. The data will be kept confidentially in the principle investigator's office for five years. After that time, the data will be destroyed.

While participating has no direct benefits to you, this project will help find new perspectives in Microsoft Dynamics CRM Online Evaluation. The results from this study will be submitted to academic conferences and journals. These results and written reports will be available to you upon request when the research is done. I hope you will give your consent to participate in this project.

Although your participation in this study is desired, it is purely voluntary. Should you decide to participate but later change your mind, you are free to withdraw your consent at any time. If you are willing to participate in this project, please fill out the consent form and hand it in today. If you have any questions, concerns, or are interested in the result from this study, you can reach me by phone at *****, or by e-mail at *****.

Sincerely,

*****, Professor of Computer Information Systems, principle investigator

I consent to participate in this research project. I understand that my participation in this project is completely voluntary, that my confidentiality will be strictly protected, and that I may withdraw my consent to participate at any time.

Name (printed)

Signature

Microsoft Dynamics Customer Relationship Management (CRM) Evaluation

This study is about Microsoft Dynamics CRM Online Evaluation. We want to be clear that we are not evaluating you or your individual responses. Judging people right or wrong is not the objective of academic research. We are simply trying to get an idea of the perceptions that students in general have toward Microsoft Dynamics CRM Online. It is important that you respond to each of the question openly and honestly. All your responses will be kept completely confidential.

☞ **Please turn to the next page...**

Please answer the following questions based on your evaluation about **Microsoft Dynamics CRM Online** you just worked with. A "7" indicates that you strongly agree with the statement. A "1" indicates that you strongly disagree with the statement. If you are not sure, please indicate "4."

	<u>Strongly Disagree</u>				<u>Strongly Agree</u>		
1) Microsoft Dynamics CRM Online is valuable for competitive analysis.	1	2	3	4	5	6	7
2) Microsoft Dynamics CRM Online is valuable for sales managers to manage clients' information.	1	2	3	4	5	6	7
3) Microsoft Dynamics CRM Online is a valuable software for brand management in general.	1	2	3	4	5	6	7
4) Microsoft Dynamics CRM Online is helpful for managers to develop a good relationship with their clients.	1	2	3	4	5	6	7
5) Microsoft Dynamics CRM Online is valuable for brand image management.	1	2	3	4	5	6	7
6) Microsoft Dynamics CRM Online is valuable for product management.	1	2	3	4	5	6	7
7) Microsoft Dynamics CRM Online is valuable for making pricing decisions.	1	2	3	4	5	6	7
8) Microsoft Dynamics CRM Online is valuable for making promotion decisions.	1	2	3	4	5	6	7
9) Microsoft Dynamics CRM Online is easy to use.	1	2	3	4	5	6	7

10) Microsoft Dynamics CRM Online can enhance my learning experience in the classroom. 1 2 3 4 5 6 7

11) Overall speaking, I find Microsoft Dynamics CRM Online interesting to use. 1 2 3 4 5 6 7

Demographic Data:

1. Your age: _____ years old.
2. Gender: Male(1) _____ Female(2) _____
3. What is your major?
_____ Accounting (1)
_____ Computer Information System (2)
_____ Finance (3)

_____ Marketing (4)
_____ Management (5)

_____ International Business (6)

_____ Computer Science

_____ Others (7) Please specify: _____

Biographical Notes

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