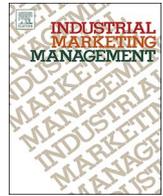




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Target and position article

## Multidexterity in customer relationship management: Managerial implications and a research agenda

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### ABSTRACT

Based on the many contributions covering business-to-business relationship management found in the pages of *Industrial Marketing Management* and other prominent journals within the field of business market management, we suggest framing the managerial challenge of customer relationship management in terms of multidexterity, i.e., the simultaneous management of (potentially) competing agendas. We build our arguments on the extant literature about ambidexterity, and we explore the existence of multidexterity in customer relationship management as well as the managerial implications of multidexterity. In addition, we develop a research agenda for deriving additional insights about customer relationship management.

### 1. Introduction

*Industrial Marketing Management* has been a cornerstone in the advancement of our understanding of business marketing for the past 25 years. In this period of time, our understanding of business marketing has advanced not only in depth (i.e., toward a more detailed understanding of specific tasks) but also in breadth (i.e., toward an understanding of the many tasks that fall into the domain of business marketing). The many contributions focused on enhancing our understanding of business market management suggest that business marketing consists of a plethora of tasks, such as building new customer relationships, maintaining existing relationships, exploring new markets and protecting existing ones, and generating customer insights.

For many decades, marketing research has focused on different *orientations* (e.g., Kohli and Jaworski, 1990) or *waves* of marketing (e.g., Hedaa and Ritter, 2005). The emphasis on orientations, such as customer orientation, product orientation, and market orientation, implies that the focus of marketing is not only *on* something but also *away* from something else. In other words, there is a distinct managerial choice, such that one agenda “wins” over other agendas. This dichotomy is also implied in newer contributions to marketing thinking, such as service-dominant logic (SDL) (Vargo and Lusch, 2004) in which the orientation is toward services and away from goods. However, what about firms servicing customers who are focused on both services and goods? How can a firm manage combinations and co-existence?

The classic 4Ps of marketing decisions (McCarthy, 1964) and the balanced scorecard (Kaplan and Norton, 1996) suggested that firms

need to master four different focus areas at the same time. Additions to the 4P model led to the emergence of 7Ps (Booms and Bitner, 1980) and the 30Rs (Gummesson, 1995), which have added to the complexities of marketing. Common to these contributions is the notion that the managerial challenge is not necessarily about choosing the right P, the most important R, or the most appropriate orientation, but to achieve all of them simultaneously while managing the interplay among these different tasks.

This paper's first contribution is an illustration of the multiplex nature of business marketing at the customer relationship level. We suggest that customer relationship management can be conceptualized as 36 different tasks that may be equally important for a firm wishing to optimally manage its customer relationships. In this regard, we establish the existence of multiplexity in customer relationship management and the need to manage multidexterity.

We then turn to the managerial challenges of multidexterity. In people, ambidexterity is the ability to use both hands (or both feet) at the same time, like drummers or helicopter pilots. Ambidexterity is also a well-known concept in business and it has been extensively studied in that context. Its original conceptualization addresses the balance between exploration and exploitation (e.g., Duncan, 1976) or the “ability to simultaneously pursue both incremental and discontinuous innovation and change” (Tushman and O'Reilly, 1996, p. 24).

Ambidexterity has also been discussed in the pages of *Industrial Marketing Management*. In an attempt to move beyond analyses of ambidexterity within innovation and in relation to firm performance (e.g., Li and Huang, 2012; Zhang, Edgar, Geare, and O'Kane, 2016), Sok, Sok,

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and De Luca (2016) explore the duality of selling and servicing by salespersons as selling-service ambidexterity. More recently, Nijssen, Guenzi, and van der Borgh (2017) documented the importance of acquisition-retention ambidexterity—the ability of a sales force to handle customer acquisition and customer retention at the same time—for organic sales growth.

However, customer relationship management consists of more than just two agendas. As such, we apply the term “multidexterity” to capture the multitude of tasks and objectives that are relevant in customer relationships at the same time. While the acknowledgement of complexity beyond a factor of two is widespread in the management literature, the term ‘multidexterity’ is notably overlooked and underutilized. In fact, we have found only a few references to the term (e.g., Grant, 2008; Markman, Siegel, and Wright, 2008; Tallman, Luo, and Buckley, 2017). We define multidexterity as a firm’s ability to simultaneously perform more than two tasks in order to achieve different and multiple objectives.

We look to the ambidexterity literature to find arguments about how to successfully manage the complexities of business marketing. “Organizational scholars have recognized the importance of simultaneously balancing seemingly contradictory tensions and have begun to shift their focus from trade-off (either/or) to paradoxical (both/and) thinking” (Gibson & Birkinshaw, 2004, p. 209, referring to Bouchikhi, 1998; Earley and Gibson, 2002; Gresov and Drazin, 1997; Koot, Sabelis, and Ybema, 1996; Lewis, 2000; Morgeson and Hofmann, 1999). We find that the four mechanisms suggested in the ambidexterity literature have only been tested in the context of customer relationship management to a limited degree, and that some of the suggestions cannot adequately inform customer relationship management research and practice. Therefore, we develop a research agenda on multidexterity in industrial marketing aimed at addressing researchers’ and practitioners’ evolving needs for additional insights.

## 2. Multidexterity and customer relationships

Buyer-seller relationships have been a central object of study since the launch of *Industrial Marketing Management*. Much effort has been put into framing variations in business relationships, which range from transactional “true market” relationships to highly collaborative, long-term “market failure” relationships. As a consequence, the focus of marketing theory and practice has been significantly extended from a transactional, neoclassical, market-oriented, arm’s-length view of business-to-business relationships to include an emphasis on close, trustful, long-term relationships (e.g., Dwyer, Schurr, and Oh, 1987; Ford, 1980; Håkansson, 1982). While many contributions in the marketing field describe and distinguish relationships along a continuum ranging from transactional to relational (e.g., Coviello, Brodie, Danaher, and Johnston, 2002; Day, 2000; Wilson, 2000), alternative approaches analyze relationships in terms of three distinct modes markets, hierarchies and relationships (e.g., Ritter, 2007; Thorelli, 1986) or in terms of relationship portfolios (e.g., Turnbull and Zolkiewski, 1995; Wilkinson and Young, 1994).

Therefore, a firm’s market-relating capability cannot be constrained to or singularly focused on building close, intense, trust-based relationships. Instead, that capability must include the handling of a variety of relationships and a range of different interaction practices (Coviello et al., 2002). The interaction modes, which are known as “go-to-market strategies,” are not mutually exclusive. In fact, they are complementary, with each mode or strategy characterized by different properties, advantages, and challenges.

The continuum from transaction to integration creates the first multicentricity challenge: no firm can handle all of its customer relationships at one level. Instead, firms need to be able to handle relationships at different levels. A firm’s relationship multicentricity (i.e., its handling of different kind of relationships) also supports individual relationships as they evolve over time and, therefore, need different

forms of relationship management. This was illustrated in two seminal articles published by Ford (1980) and Dwyer et al. (1987), and later empirically verified by Jap and Anderson (2007) (for a more recent contribution on relationship evolution, see Harmeling, Palmatier, Houston, Arnold, and Samaha, 2015). Many contributions acknowledge that relationships may regress or fail to develop. For example, Ford, Hakansson, and Johanson (2002) explicitly point to reverse movements between the relationship stages.

In terms of portfolios of customers, firms have six strategic options for each of their business relationships (Ritter and Geersbro, 2015):

- Establish/acquire: Business relationships do not simply begin—they need to be established. Ford (1980) distinguishes two stages: the “pre-relationship stage” for evaluating a new business partner and the “early stage,” which includes sample deliveries and negotiations. This relationship management task describes the process of transforming a non-customer into an active customer or, in other words, the process of turning a prospect into a buying customer (e.g., Valtakoski, 2015). The establishment of new relationships is a common theme in the marketing literature, where it is discussed under such headings as customer acquisition (Reinartz, Thomas, and Kumar, 2005) and supplier selection (Ellram, 1990). The details of this process have received a great deal of attention in recent years, as business-to-business selling has moved toward a more relational paradigm (e.g., Doyle and Roth, 1992).
- Develop: This relationship management task describes a process in which a firm wants to change a business relationship in a way that strengthens the relationship and/or enhances the value created in the relationship by increasing the level of trust, commitment, integration, or value creation. Ford (1980) refers to “increasing formal and informal adaptation” and “increasing cost reduction” as characteristics of this dimension. In the sales literature, this task is typically referred to as “upselling” or “cross-selling” (e.g., Reinartz, Krafft, and Hoyer, 2004).
- Maintain: This relationship management task describes a process in which a firm wants to maintain a given relationship in its current form. In other words, no changes the scope and volume of business or in the way the relationship is managed are intended. The main thrust of relationship management literature is about this long-term, institutionalized form of continued interaction, which is labelled “final stage” and is characterized by extensive institutionalization and stability (Ford, 1980). Sometimes referred to as “retaining,” maintaining a relationship’s scope and scale requires effort. In fact, without constant effort, relationships eventually decline, fade, and ultimately dissolve (Halinen and Tähtinen, 2002). Thus, the maintenance of business relationships requires processes to be successful.
- Reduce: As a counterpart to “develop,” which has a positive connotation, this relationship management task describes a process in which a firm wants to change a given relationship in a way that weakens the relationship and/or lessens the created value. To the best of our knowledge, this dimension of relationship management has not received much attention in the literature, where it is merely implicitly treated as “negative development.” However, our discussions with practitioners suggest that reducing is a capability that differs significantly from developing. For various reasons, relationships may reach a point at which the scale and scope of the business cannot be maintained or developed (e.g., Ford et al., 2002). Therefore, relationship management needs to address reductions in resource allocations and value creation.
- Terminate: While this task was not of interest in early studies of business relationships, the termination of business relationships has recently received considerable attention under several headings, such as dissolution, ending, and termination (e.g., Giller and Matear, 2001; Halinen and Tähtinen, 2002; Holmlund and Hobbs, 2009; Ritter and Geersbro, 2011). This relationship management task describes a process in which a firm wants to actively end business

transactions with a given partner.

- **Block:** This relationship management task captures processes in which a firm wants to avoid business transactions with a given customer. This desire to avoid can be the result of different factors, including a lack of strategic fit between the customer and the supplier, a lack of resources to handle the customer, a lack of profit potential, or a potential conflict of interest with other customers or partners in the supplier's ecosystem. This dimension has not been extensively analyzed even though its relevance in terms of avoiding “bad” customers and dealing with unwanted business has been acknowledged in the termination literature (e.g., Cao and Gruca, 2005). If a firm is unable to block or resist unwanted customers, it will end up in relationships that not only fail to create value for the firm but also utilize valuable resources that could have been put to better use in other relationships.

Our empirical work suggests that firms have customers in many, if not all, of the six strategic options and, as such, they need to focus on all six dimensions of relationship management (e.g., Ritter and Andersen, 2014). For example, firms cannot only be development-centric, they also need to be termination-centric, reduction-centric, and so on.

Customer relationships can also be understood as a series of episodes (Schurr, Hedaa, and Geersbro, 2008) and these episodes can vary significantly. Ritter and Geersbro (2015) have developed a list of generic activities that can capture these differences, as each episode may involve a different mix of these activities.

### 2.1. Convincing

The overall aim of convincing is to reach an agreement between the customer and the supplier. It involves ongoing negotiation and re-negotiation between the parties during which both sides try to convince the other to accept their wishes and ideas. Without this continuous convincing of the other party, the relationship will cease to exist (i.e., dissolve).

In business-to-business relationships, formal negotiations are used to deal with specific issues, such as contract terms and conditions of exchange (see, e.g., Fisher, Ury, and Patton, 1987). However, such relationships also involve more informal negotiations in which the parties adapt to each other in subtle ways. In this way, mutual commitment and trust are built between the parties and then maintained by work to continuously convince each other that the relationship is worthwhile.

### 2.2. Socializing

Socializing is the process of getting to know each other as human beings. Social interaction is a cornerstone of business-to-business relationships (Cook and Emerson, 1978). Socializing may occur not only in the normal business setting but also during events (e.g., football and golf arrangements). Socialization activities can help overcome cultural differences and reduce uncertainties, thereby facilitating more effective interactions between the parties (Cousins and Menguc, 2006).

### 2.3. Delivering

While the convincing and socializing processes allow for the development of a mutually agreed understanding of exchange and a platform for that exchange, suppliers and customers need to establish processes that will enable them to fulfill their value propositions. Business relationships are only valuable when the relationship serves as a mechanism for the exchange of valuable resources.

In a business-to-business relationship, delivering includes living up to each other's expectations and to more implicit promises, as well as comparing one relationship to expectations about an alternative (Schurr et al., 2008). As such, the parties need to constantly deliver in order for the relationship to be mutually satisfactory.

### 2.4. Linking

Given the rising pressure to focus on one's core business, suppliers often use third-party providers as complementors in order to fulfill their value propositions. Increasingly, the involvement of parties other than the buyer and the seller is necessary (Lambert and Cooper, 2000). The main supplier must link additional suppliers to their customers in order to enable these suppliers' delivery processes. In many cases, a supply network of potentially very diverse actors that work together emerges to satisfy a customer. Thus, the ability of a firm to be a part of or orchestrate such constellations become increasingly important (see, e.g., Möller and Rajala, 2007).

### 2.5. Learning

As firms interact with each other throughout a customer-supplier relationship, they learn about each other. Business partners share information about successful and unsuccessful experiences with products, changes in needs, changes in market structures, new technologies, unexpected problems, and changes in their strategies and policies. In fact, learning can be an important source of innovation (Calantone, Cavusgil, and Zhao, 2002) and it can contribute to firms' performance (Slater and Narver, 1994).

### 2.6. Monitoring

Firms engage in monitoring activities in order to control their deliveries and to document the potential to deliver value. Such activities may include meetings with customers and suppliers to follow up on service-level agreements, key performance indicators, and the costs of servicing the customer. Just as digitalization has created new opportunities to monitor performance and changed the points at which monitoring occurs (Lancioni, Smith, and Oliva, 2000), we expect new technologies, such as big data and the Internet of Things (Erevelles, Fukawa, and Swayne, 2016), to expand the focus of monitoring from control to include identifying and seizing marketing opportunities.

In total, there are six strategic tasks and six types of activities, which yields a total of 36 juxtapositions (Fig. 1) and, therefore, approximately 69 billion ( $=2^{36}$ ) possible combinations or patterns to handle. Management of this situation certainly requires more than two hands. At the relationship level, multidexterity means that a firm cannot only optimize one process and neglect the others. For example, it is not enough to convince—a firm must also deliver. Similarly, it is not meaningful to only socialize, even though most interactions contain a social dimension. Firms need to optimize all processes to be successful at the relationship level.

## 3. Managing multidexterity

The management literature suggests four ways of managing ambidexterity (e.g., Gibson and Birkinshaw, 2004): structural separation, task partitioning, temporal separation, and contextual enabling (Fig. 2). Organizations employing *structural separation* build different units for different tasks, so that one unit has a clear focus on one task and other units focus on other tasks (e.g., finance, production, R&D, marketing). While this eases the work within the units, many firms have realized the drawbacks of such organizational silos. Within the marketing domain, several silo issues have been identified, such as the “different thought worlds of sales and marketing units” (Homburg and Jensen, 2007). Some firms structurally separate the customer acquisition aspect of customer relationship management from the customer maintenance aspect, with high coordination costs as a consequence. With regard to relationship processes, there is a natural limit to structural separation, as the coordination costs are likely to explode as the extent of structural separation increases. Even if the supplier manages to efficiently coordinate different tasks, the customer may still view the supplier as

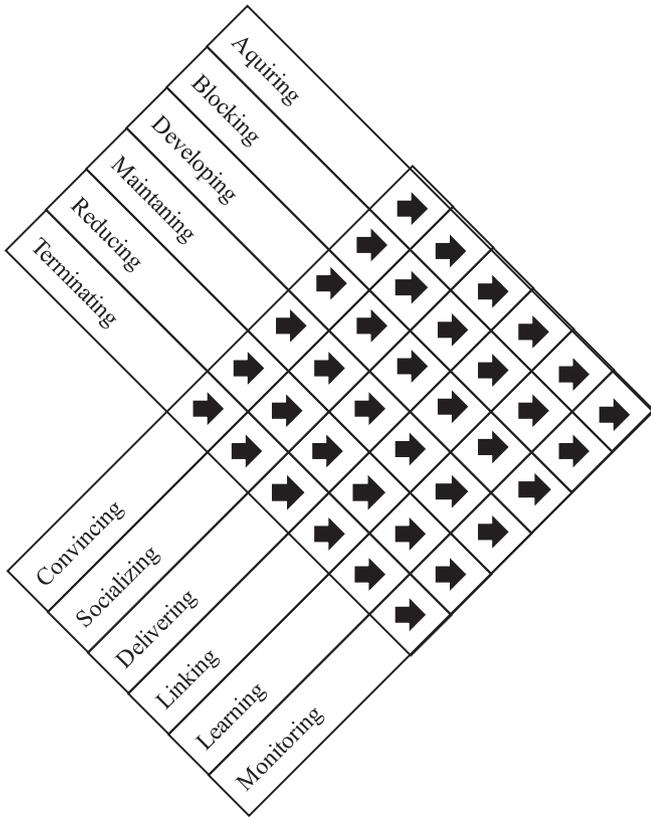


Fig. 1. 36 customer relationship management processes.

confusing with too many contact points and dispersed responsibilities.

*Task partitioning* within a single business unit occurs when “one group adopts an ‘organic’ structure while another takes on a ‘mechanistic’ structure” (Gibson and Birkinshaw, 2004, referring to Adler, Goldoftas, and Levine, 1999; Hedlund and Ridderstrale, 1997; McDonough and Leifer, 1983). As employees specialize in specific tasks, they need to build interfaces among the different specializations within their business units. Task partitioning is compliant with account teams and with team management of business relationships (Helfert and Vith, 1999) under the assumption that each team member contributes their special capabilities to the management of a relationship.

*Temporal separation* refers to “a system in which an entire unit focuses on one set of tasks one day, then on a different set of tasks the next” (Gibson and Birkinshaw, 2004; referring to Adler et al., 1999; Duncan, 1976; McDonough and Leifer, 1983). In customer

relationships, temporal separation can be applied during the relationship development stages (Ford, 1980; Dwyer et al., 1987), as different tasks (e.g., establishing, maintaining, learning, and routines) occur at different points in time. Temporal separation also works well for relationship strategies when the strategic plan in one time period is to develop a relationship while the plan in another period is to maintain that relationship. However, temporal separation becomes more challenging regarding the processes used, for example, in a one-hour customer meeting. In such situations, is it meaningful to temporally separate the different processes, or is multitasking more likely to be realistic and beneficial?

*Contextual enabling* refers to “building a business unit context that encourages individuals to make their own judgments as to how best divide their time between the conflicting demands for alignment and adaptability” (Gibson & Birkinshaw, 2004, p. 211). Instead of building a “dual structure” (Duncan, 1976) by separating the different tasks, contextual enabling proposes a single structure flexible enough to simultaneously handle different tasks. This approach to multidexterity is intriguing for marketing, as it enables individuals (e.g., salespeople and key account managers) to act “between” different agendas on their own.

The four ways of managing ambidexterity point to four sets of managerial questions for executives to answer:

- 1) To what extent can different tasks be allocated to different organizational units? To what extent are tasks separated by, for example, geographical (spatial) dispersion? What kind of coordination efforts and costs arise due to that structural separation?
- 2) To what extent can tasks be divided into sub-tasks? Can the different sub-tasks be meaningfully distributed among members of a team?
- 3) Can different tasks be spread out over time along a life cycle or within a yearly activity wheel? How can the appropriate time to transition from one task to another be determined? How can a timely transition be made efficiently?
- 4) Which performance-management systems or key performance indicators should be employed? Which training should be offered? Which corporate culture is needed to promote multidexterity at the individual level? Which resources need to be available?

Clearly, there are many managerial questions to consider and the answers are by no means trivial. In addition, some of these questions have not been sufficiently addressed in the extant research, which leads to a research agenda for multidexterity in business marketing.

4. A research agenda

In this paper, we have illustrated the existence of many tasks in

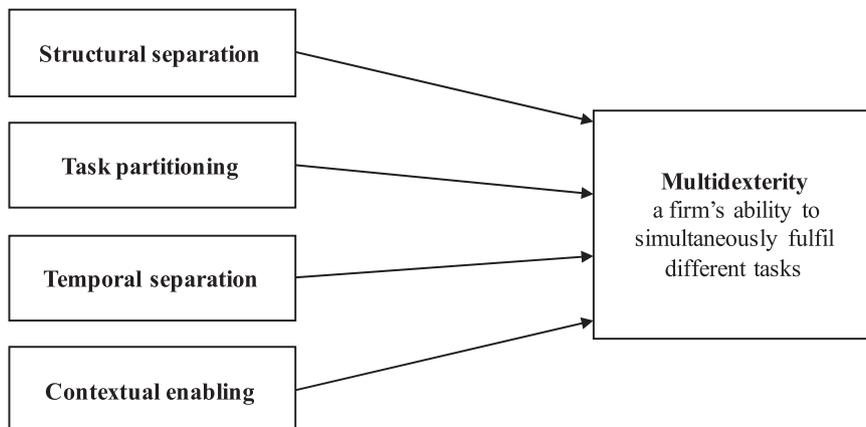


Fig. 2. Antecedents of multidexterity.

customer relationship management and we have shown that these tasks need to be performed simultaneously, leading to a need to manage multiplexity. While many, if not all, of the 36 tasks have been researched in business markets, most of those studies focus on a single task or small sets of tasks. As such, they fail to capture the existence of multiplexity in its totality. In other words, we lack studies that cover many tasks, and analyze their coexistence and mutual interdependence.

While we focused exclusively on customer relationship management to illustrate our arguments, the concept of multidexterity should also be considered in other areas of business marketing. For example, the distinction between market taking and market making (market shaping), and the distinction between market driven and market driving offers starting points for interesting discussions of marketing management. The STP framework (segmentation-targeting-positioning) highlights three different tasks that must be handled for successful market management. Möller and Halinen (1999) suggest four levels of management in business markets. Therewith, there is a need to identify the different tasks involved in business marketing and to draw the multiplex landscape of marketing at different analytical levels.

As discussed above, our knowledge about the usefulness and appropriate application of management mechanisms for ambidexterity is limited. We need a better understanding of how firms can optimize their multidexterity capabilities in order to drive performance. Comparisons of different structural, temporal, and task-separation options in case studies and quantitative analyses as well as studies of transitions (e.g., the introduction of co-location or the movement of workspaces in organizations) would be helpful for developing managerial guidelines. Likewise, insights into the design of successful contextual enabling of multiplexity in business marketing could improve practice. In particular, studies of incentive systems and monitoring performance would be instrumental in deriving concrete knowledge about practical implementations. In terms of contextual separation, studies of how salespeople adapt to the context (e.g., Spiro and Weitz, 1990; Weitz, 1980; Weitz, Sujan, and Sujan, 1986) provide a good starting point for further research.

In terms of task separation, related studies in the literature could be considered. For example, studies on different types of sales people, such as farmers and hunters (e.g., Rackham and Wilson, 1990), illustrate how different sales people specialize in different tasks. Also, Helfert and Vith (1999) serves as a good starting point for understanding the complexities of sales teams and buying centers. The people element is paramount in ensuring success in task separation.

When it comes to temporal separation, we find a clear link to the literature on business relationship development (e.g., Dwyer et al., 1987; Ford, 1980; Schurr et al., 2008). We need to understand the implications of the tasks being performed at different points in time. What happens today may affect the future of the relationship and vice versa, while what has happened earlier influences the quality of the relationship today (Jap and Anderson, 2007).

Finally, we have limited our discussion to established suggestions for managing multidexterity. This does not imply that these are the only options. Future studies may investigate new methods of enabling multidexterity in organizations. Insights gained from such research will not only improve marketing practice but also make important contributions to the ambidexterity literature.

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