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Presenting a Model for Improving Customer Relationship Management with Sustainable Development Using a Meta-Synthesis Approach

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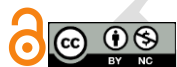*** Corresponding author email address**: shb.gholipour@gmail.com

A r t i c l e   I n f o

A B S T R A C T

Objective: The primary objective of this research is to develop a comprehensive model for improving Customer Relationship Management (CRM) with sustainable development using a meta-synthesis approach.

Methodology: This study employs a qualitative meta-synthesis method, utilizing the seven-step model proposed by Sandelowski and Barroso (2007). A systematic literature review was conducted, analyzing both Persian and English academic articles published between 2010 and 2023. A total of 602 articles were initially reviewed, with 54 high-quality studies selected for further analysis. Key data were extracted, coded, and synthesized using Atlas.ti software, leading to the identification of critical dimensions and indicators.

Findings: The research identified four key dimensions, eight components, and 53 indicators critical for improving CRM with sustainable development. The identified dimensions include: (1) Knowledge Development (empowerment and development, information technology and knowledge); (2) Organizational Behavior (organizational citizenship behavior, organizational factors); (3) Market Environment (political and economic conditions, market and customer factors); and (4) Managerial Factors (performance and financial factors, managerial and strategic factors). These findings align with several previous studies, confirming the importance of integrating sustainability into CRM practices.

Conclusion: The study presents a comprehensive model that integrates CRM with sustainability, providing a roadmap for organizations to enhance customer relationships while promoting long-term sustainability. The findings underscore the importance of knowledge development, organizational behavior, market adaptability, and effective managerial strategies in fostering sustainable CRM practices. The model serves as a strategic guide for businesses aiming to balance customer satisfaction, profitability, and sustainability goals.

Keywords: *Customer Relationship Management, Sustainable Development, Meta-Synthesis.*

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1 Introduction

In recent decades, there has been significant growth in environmental issues and challenges across various parts of the world, placing considerable pressure on factories. In response to these challenges, many factories have begun exploring the feasibility and relevance of incorporating environmental considerations into their business strategies to align their strategic plans with these issues (Ghiasabadi Farahani & Ghafari Ashtiani, 2018). On the other hand, sustainable development has emerged as one of the central topics in economics (Agbedahin, 2019; Sanguino et al., 2020; Sen, 2013), and a wide range of non-governmental and governmental organizations have embraced it as a new paradigm for development. Generally, sustainable development considers ecological considerations as the core of economic activities. In fact, sustainable development is built on humanity's awareness of the Earth's natural resources, emphasizing the avoidance of resource wastage and neglecting future generations (Son et al., 2023). Sustainable development seeks to link the present to the future without depleting the resources needed by future generations. Achieving sustainable development requires, more than anything else, the education of consumers who can internalize all the concepts of sustainable development and beneficial perspectives for future generations. Educating sustainable consumers is now considered important, given the changing patterns of renewable and non-renewable resource consumption and land capacities (Rahman & Nguyen-Viet, 2023).

In this context, Gil-Gomez et al. (2020) demonstrated that the use of customer relationship management (CRM) could enhance the process of implementing sustainability in a company. Furthermore, engaging in sustainable practices improves consumers' perception of the brand. The concepts of sustainability and sustainable development are based on adopting practices and strategies aimed at addressing environmental, economic, and social factors to develop businesses (Ferrer-Estévez & Chalmeta, 2023). Measuring the performance of CRM is crucial for organizations. Researchers believe that CRM performance should be measured in terms of customer behaviors, as customers are the primary source of a company's value and hold the potential to enhance future revenue streams. Five dimensions of value from the customer's perspective have been proposed: social, economic, functional, environmental, and conditional, which serve as the best foundation for expanding the value structure (Khattak et al., 2024).

Customer and company commitment and loyalty lead to long-term relationships, making it essential to pay attention to customer criteria, especially those related to sustainable development (Acheampong et al., 2023).

Sustainability has become a key strategic goal globally. There are multiple definitions of sustainability, which can be classified into five categories: (1) the conventional economists' perspective, (2) the non-environmental degradation perspective, (3) the integrated view, encompassing economic, environmental, and social aspects, (4) the intergenerational view, and (5) the holistic view. In this context, sustainable CRM emerges as an evolution of CRM. Sustainable CRM refers to awareness of the environmental, social, and economic impacts of customer-centric business processes and communicating the company's sustainability issues to its customers, thus enhancing the company's value among sustainability-conscious customers (Ferrer-Estévez & Chalmeta, 2023). Sustainable CRM is the result of (1) sustainability awareness within companies, (2) the evolution of information technology such as digitization, big data, etc., enabling the reengineering of CRM processes and making them more sustainable, and (3) the rise of highly responsible consumers who, aware of the negative impacts of current consumption and production models, seek more sustainable lifestyles (Diem et al., 2021).

One of the main challenges for businesses is the loss of valuable customers. A disengaged customer who opts for a competitor's services imposes additional costs on the company (Pansari & Kumar, 2017). On average, companies lose about 10% to 30% of their customers annually; however, they often do not know why they are losing these customers. Many companies continuously focus on acquiring new customers without concern for the customers they are losing; dissatisfaction is undoubtedly one of the main reasons for customer loss (Khantimirov et al., 2020).

The concept of CRM is regarded as a broad business strategy that uses technical knowledge to manage long-term relationships between industry and customers. Now, every sector has realized that their core for business success is the "customer," and customer behaviors and preferences can only be identified through CRM practices. However, in many cases, the implementation of CRM has been disastrous due to user incompatibility, lack of familiarity with the system, and failure to consider essential factors for its effective use. CRM is an innovative technology that aims to enhance customer satisfaction, loyalty, and profitability by acquiring, developing, and maintaining effective

relationships and interactions with customers (Baashar et al., 2020).

Given the aforementioned points and the role CRM can play in sustainable development, this study aims to propose a model for improving CRM with sustainable development using a meta-synthesis approach. The primary question posed in this research is: How is the model for improving CRM with sustainable development structured using a meta-synthesis approach?

2   Methods and Materials

Given that the primary objective of this research is to present a model for improving customer relationship management (CRM) with sustainable development using a meta-synthesis approach, a qualitative research method (meta-synthesis) has been employed. This research, based on its objective, is classified as developmental research. Scientific studies, in terms of how they obtain the necessary data for research, can be divided into two categories: experimental and non-experimental (descriptive). Since the application of the model for improving CRM with sustainable development using a meta-synthesis approach is being conducted for the first time in the country, the research approach is exploratory.

In the meta-synthesis method, the population studied includes articles related to factors improving CRM with sustainable development from foreign databases such as Emerald and ScienceDirect, as well as Persian databases like Magiran and the Comprehensive Portal of Humanities. The sampling method used to select the articles is purposive sampling, aiming to achieve theoretical saturation. The data collection method in the meta-synthesis approach is a documentary-library method.

To ensure reliability, the paired comparison or inter-coder agreement method was used. In this method, an expert as a second researcher codes the selected articles independently, without knowing the coding process of the main researcher. If there is a high similarity in the separate coding by the two researchers, the reliability of the research process is assessed as suitable. The Kappa coefficient is used to calculate this similarity coefficient. In the present research, in the sixth step of the meta-synthesis process, the reliability of this technique was evaluated as valid using the paired comparison method and the Kappa index.

For data analysis in the first qualitative stage and the use of the meta-synthesis approach, Sandelowski and Barroso's (2007) model was utilized. This model consists of 7 steps (formulating the research question, conducting a systematic literature review, searching and selecting appropriate articles, extracting information from the articles, analyzing and synthesizing qualitative findings, quality control, and presenting the findings). In this section, for data analysis, open coding and the Atlas.ti software were used, and through content analysis, the codes were classified and categorized to reach the model and identify the dimensions and components.

3   Findings and Results

Step 1: Formulating the Research Question

In this step, to formulate research questions for a systematic literature review, the following questions need to be answered: What, Who, When, and How. These questions pertain to the method used to conduct the studies. In this method, secondary data are analyzed. The researcher includes certain articles in the meta-synthesis method based on specific criteria and excludes others from the process.

Step 2: Systematic Literature Review

For this study, the time frame for English-language articles was from 2010 to 2023, and for Persian-language articles from 2011 to 2023. The external databases used were ScienceDirect and Emerald, while the Persian databases used were NoorMags, Magiran, and the Comprehensive Portal of Humanities. In total, 602 studies were identified for initial review. As mentioned earlier, previous studies have not provided a comprehensive examination using the meta-synthesis approach to propose a suitable model for the dimensions of CRM with sustainable development.

Step 3: Searching and Selecting Relevant Studies

To select appropriate sources, the keyword "customer relationship management with sustainable development" was initially searched across databases. However, since this term was broad, many unrelated topics appeared. Therefore, the search term was refined word by word, ultimately using the key phrase "customer relationship management and sustainable development" in both Persian and English. Additionally, criteria were established to select relevant articles, and a quality assessment of the studies was conducted to avoid including weak articles and to reach suitable results. In this step, articles were reviewed multiple times, and those that did not align with the topic were excluded at each stage. The article review process involved examining various parameters, such as title, abstract, content, and text. The Critical Appraisal Skills Programme (CASP) provides several checklists depending on the type of

articles being reviewed. In this study, prior research was assessed using the main dimensions of CASP checklists, focusing on: (1) the validity of the results, (2) the type of results, and (3) the applicability of the results, evaluated through 10 indicators. Ultimately, 54 articles with medium to high quality were selected.

Step 4: Extracting Information from Sources

At this stage, the information is extracted from the articles. This step is similar to the first stage of the grounded theory method (open coding). In this study, through a systematic and thorough review of the articles, along with repeated examination of the research questions, results and codes were extracted from the selected articles based on the criteria presented in Step 1.

Step 5: Data Analysis and Synthesis

In this section, coding was used for data analysis and synthesis. In addition to categorizing the central codes with a content analysis perspective, reputable sources and international standards were used to determine the core codes. Then, each selected code was defined for its category. As a result, the factors were grouped in a new way, and the proposed model was presented in Table 1.

Table 1

Dimensions and Components

Dimension	Component	Indicator
Development & Knowledge	Empowerment and Development	1. Trust and Confidence
		2. Employee Training
		3. Employee Motivation
		4. Employee Incentives
	IT and Knowledge	5. IT Systems
		6. Information System Capabilities
		7. Data Management
		8. Knowledge Management
Behavioral & Organizational	Organizational Citizenship Behavior	9. Professional Ethics
		10. Increased Compliance
		11. Benevolence
		12. Accountability
		13. Commitment to Obligations
		14. Senior Management Commitment
		15. Virtue and Generosity
		16. Willingness to Advance Citizenship
		17. Citizenship Virtue
		18. Duty Consciousness
	Organizational Factors	19. Security
		20. Organization Size
		21. Complexity
		22. Culture
Environmental & Market	Political and Economic Conditions	23. Thinking of Others' Rights
		24. Responsibility
		25. Law Compliance in Society
	Market and Customer-Related Factors	26. Offering Diverse Services
		27. Quick Service Delivery
		28. Customer Information Provision
		29. Market Share Increase
		30. Building Long-Term Relationships
		31. Monitoring Profitable Customers
		32. Word-of-Mouth Advertising
		33. Brand Image
		34. Creating Customer Dependency
		35. Ensuring Customer Loyalty
		36. Creating Value for Customers
		37. Focusing on Select Customers
		38. Customer Recommendations
		39. Better Understanding of Needs
		40. Customer Satisfaction
		41. Competitive Advantage
Managerial & Performance	Performance and Financial Factors	42. Performance Effectiveness
		43. Clear and Defined Strategy
		44. Employee Productivity
		45. Goal Setting

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Managerial and Strategic Factors	46. Profitability
	47. Cost Management
	48. Strategic Decision-Making
	49. Proper Organization
	50. Process
	51. Opportunity Management
	52. Innovation
	53. Internal Integration

Step 6: Data Quality Control

In the data quality control phase, the extracted concepts were compared with the opinion of an expert. Cohen's Kappa coefficient, a statistical measure of inter-rater or inter-coder agreement for qualitative (nominal) items, was used to indicate the reliability of the factors. According to Table 6, the calculated Kappa coefficient is at a valid level of agreement. The Kappa coefficient was used to measure agreement between the two coders. The Kappa index was calculated based on the number of similar and different codes generated, resulting in a Kappa index of 0.8, which is considered a valid level of agreement.

Step 7: Presenting the Findings

The 54 selected articles were carefully reviewed by the researchers over a period of 6 months. The necessary information was identified based on the main objective, which was to identify the factors influencing CRM and sustainable development. After receiving input from academic experts (5 experts and professors), the synthesis of findings was classified into 4 dimensions, 8 components, and 53 indicators. After completing the seven steps of the meta-synthesis, the coded data were used to design the model.

Figure 1

Presenting the Model for Improving CRM with Sustainable Development Using a Meta-Synthesis Approach
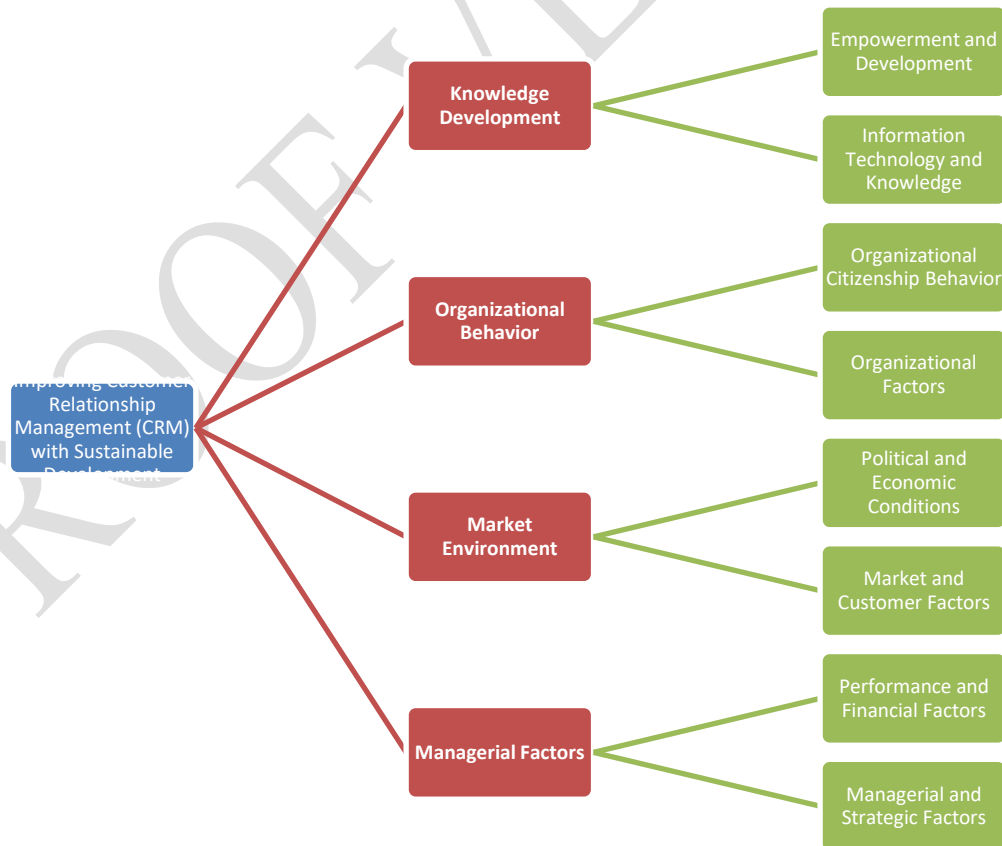
4 Discussion and Conclusion

The primary objective of this research was to develop a model for improving customer relationship management (CRM) in conjunction with sustainable development using a

meta-synthesis approach. The application of Sandelowski and Barroso's (2007) model in conjunction with the analysis of 54 relevant studies identified four key dimensions, eight components, and 53 indicators. These dimensions are: (1) Knowledge Development (empowerment and development, IT and knowledge); (2) Organizational Behavior (organizational citizenship behavior and organizational factors); (3) Market Environment (political and economic conditions, market and customer-related factors); and (4) Managerial Factors (performance and financial factors, managerial and strategic factors). The findings align with previous research (Baashar et al., 2020; Del Vecchio et al., 2021; Diem et al., 2021; Javid & Ne'matizadeh, 2021; Naibol-Asl, 2020; Ngelyaratan & Soediantono, 2022).

Knowledge Development emerged as one of the critical dimensions for enhancing CRM. This dimension emphasizes the importance of empowering employees and fostering their professional development through robust IT systems and effective knowledge management. The inclusion of IT systems as a core element underscores the critical role of technology in facilitating efficient CRM processes. This finding is supported by previous research (Acheampong et al., 2023; Klimecka-Tatar et al., 2021; Ngelyaratan & Soediantono, 2022), which highlighted the need for advanced technological infrastructure to support customer-focused business strategies.

Organizational Behavior was another key dimension identified in this research. Within this dimension, the study highlights the significance of organizational citizenship behavior and other organizational factors such as culture, size, and security. This aligns with the prior findings (Naibol-Asl, 2020) that emphasized the role of organizational culture and employee behavior in shaping effective CRM practices. Organizational citizenship behavior—actions like professional ethics, adherence to commitments, and responsiveness—is particularly important as it directly influences customer perceptions of the company. By ensuring that employees go above and beyond their formal responsibilities, businesses can foster long-term, trust-based relationships with their customers.

The Market Environment dimension focuses on external factors such as political and economic conditions, as well as market- and customer-related factors. This study reveals that businesses need to adapt their CRM strategies to these environmental conditions to remain competitive and maintain customer loyalty. Prior findings (Bahri-Ammari, 2014; Haudi et al., 2022; Muhammad Abubakar & Mohammed, 2020; Racbhini et al., 2021; Sivesan, 2012) also

point to the impact of external market dynamics on CRM effectiveness, suggesting that businesses that are agile in responding to changes in the political and economic environment can better maintain customer satisfaction and trust. Similarly, the importance of understanding customer needs and the ability to offer diverse, personalized services to profitable customers is crucial in maintaining a competitive edge in the market.

Managerial Factors, including performance, financial factors, and strategic decision-making, were also identified as fundamental to improving CRM with sustainable development. Efficient cost management, profitability, clear strategic decision-making, and fostering innovation are essential for long-term business success and customer satisfaction. This dimension aligns with the prior findings that argued that CRM success depends on a company's ability to integrate strategic management with customer-focused initiatives (Baran & Galka, 2016; Diem et al., 2021; Ghiasabadi Farahani & Ghafari Ashtiani, 2018; Javid & Ne'matizadeh, 2021; Klimecka-Tatar et al., 2021; Rahman & Nguyen-Viet, 2023).

Sustainable CRM is an evolving concept that integrates traditional CRM with sustainability principles. Sustainable CRM not only focuses on profitability but also on creating value that benefits customers, society, and the environment. This is in line with the growing recognition that businesses must contribute to sustainable development while maintaining their customer base. Previous research (Agbedahin, 2019; Ferrer-Estévez & Chalmeta, 2023; Hajian & Kashani, 2021; Khattak et al., 2024; Klimecka-Tatar et al., 2021; Rahman & Nguyen-Viet, 2023) supports this notion, highlighting the importance of integrating environmental, social, and governance (ESG) factors into CRM strategies. As more consumers become aware of sustainability issues, their expectations for companies to adopt responsible business practices increase. This presents both a challenge and an opportunity for businesses to differentiate themselves by adopting sustainable CRM strategies that appeal to the values of modern consumers.

Moreover, the integration of technology into CRM systems is another crucial aspect identified in this study. Technological advancements in areas such as big data, artificial intelligence (AI), and cloud computing have transformed the way businesses interact with their customers. CRM technologies enable businesses to gather comprehensive customer data, facilitating more personalized interactions and fostering long-term loyalty. Previous findings (Golabchi et al., 2024; Haudi et al., 2022)

also highlight the role of AI-driven CRM systems in automating customer interactions, thus enabling businesses to offer faster and more efficient services. Moreover, the integration of technology across all customer touchpoints ensures a seamless customer experience, which is vital for retaining customers in an increasingly competitive market.

In summary, the dimensions identified in this study highlight the multifaceted nature of CRM, which involves not only understanding customer needs but also fostering organizational culture, adapting to market conditions, and leveraging technology. Sustainable CRM goes beyond merely responding to customer demands—it involves creating long-term value by aligning business practices with environmental and social sustainability goals.

This study presents a comprehensive model for improving CRM with sustainable development, identifying four critical dimensions, eight components, and 53 indicators. The findings provide a roadmap for businesses seeking to enhance their CRM systems while aligning with sustainability principles. Knowledge development, organizational behavior, market environment, and managerial factors are all integral to effective CRM practices, and these dimensions should be considered when designing and implementing CRM strategies.

The research confirms that CRM is more than just a tool for managing customer interactions—it is a strategic business process that can drive profitability, customer satisfaction, and long-term loyalty. By integrating sustainability into CRM, businesses can meet the expectations of modern consumers who prioritize environmental and social responsibility. This shift towards sustainable CRM requires businesses to invest in employee training, technological advancements, and innovative practices that not only serve their customers but also contribute to the greater good.

In addition, the role of technology in CRM cannot be overstated. As businesses embrace digital transformation, the ability to leverage big data, AI, and other advanced technologies will be crucial for maintaining a competitive edge. The findings of this research emphasize the importance of continuous improvement in CRM systems to ensure they remain relevant and effective in a rapidly changing market environment.

Future research could further explore the relationship between sustainable CRM practices and customer loyalty in different industries, as well as the long-term financial impact of adopting sustainable business practices in CRM. Additionally, expanding the model to include emerging technologies such as blockchain or the Internet of Things (IoT) could provide valuable insights into how businesses can further innovate their CRM practices.

Authors' Contributions

All authors have contributed significantly to the research process and the development of the manuscript.

Declaration

In order to correct and improve the academic writing of our paper, we have used the language model ChatGPT.

Transparency Statement

Data are available for research purposes upon reasonable request to the corresponding author.

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Declaration of Interest

The authors report no conflict of interest.

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Ethical Considerations

In this research, ethical standards including obtaining informed consent, ensuring privacy and confidentiality were observed.

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