



Customer relationship management in call centers: The uneasy process of re(form)ing the subject through the ‘people-by-numbers’ approach

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Abstract

Real-time technology has the capability of symbolising both customers and call center representatives (and the moment of interaction), purely by/as numbers, or forms. The pinnacle of this data processing is customer relationship management (CRM), where the digitised data is assembled so as to reproduce a mimetic model of the customer. This could be seen as a metamyth (Adams & Ingersoll, 1990) that, in its concealed appearance within corporate databases, seems to cut loose from any critical inquiry. In this paper, we offer an embryonic form of such a critique through the analysis of a number of original call center case studies. It seeks to analyze the nature of abstraction at the heart of IT-based CRM practices, and the contradictions that such abstraction can foster.

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1. Introduction

In the UK alone, the call center industry now employs more people than the coal, steel and automotive sectors combined. Call or contact centers are the fastest growing new form of work organisation. ‘Estimates vary, but industry experts suggest there are around 5500 UK call centers employing almost 400,000 workers (DTI, 2004, p. 1). While the speed of

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this growth in both the UK and the US has slowed down as a result of the expansion of global off shore outsourcing (Mirchandani, 2003, 2005; Noronha & D’Cruz, 2006; Odindo, Diacon, & Ennew, 2004; Taylor & Bain, 2005), call centers remain of considerable interest for students of new forms of work and especially those focusing on the use of advanced information and communication technology. In this paper, we address an aspect of call center activities that we believe has major significance for the future – the use of customer relationship management (CRM) and its effects upon customer service representatives (CSRs) and, more limitedly, customers. Our objective is to examine customer relationship management (CRM) in a call center in order to demonstrate its potential to colonise the identities of both call center workers and customers. We elaborate this later but briefly it is about how individuals’ sense of themselves can be appropriated in the service of management concerns to secure organisational objectives. Technologies of the self (Foucault, 1988a, 1988b) are expected to transform call center staff into self-disciplined subjects of sales and service who, in turn, facilitate a parallel self-disciplined consumption on the part of customers. Overall, the paper seeks to analyze the nature of abstraction at the heart of IT-based CRM practices, and the contradictions that such abstraction can foster in a way not dissimilar to Kallinikos (1995) when he speaks about the architecture of the invisible.

The paper is divided into two main sections the first of which describes how the pursuit of high levels of service quality and the use of data in managing relations has changed the nature of work for call center staff. It is clear that surveillance of staff continues through the electronic boards and the automatic distribution of calls (ADC). However, the *content* of the customer service representatives (CSR’s) activities and not just the framework of the activity has become the locus of management monitoring. The objective is to convert this content into electronic data that can be manipulated for the purposes of improving performance. Customer relationship management (CRM) involves a re-appropriation of management control over the sales activity in a way not dissimilar from how scientific management re-asserted control over shopfloor production through separating conception from execution in the early part of the 20th century (Braverman, 1974; Taylor, 1911). Since we are not IT specialists, we take an ensemble, multi-layered, multi-actor, and processual view of CRM. In doing so, we aim to avert the pitfalls of either an excessive focus on the technology-as-tool and information processing capacity with little reference to the social relations that are its condition and consequence, or a purely nominal view in which the technology is taken for granted and only invoked in name but not in fact (Orlikowski & Iacono, 2001, p. 128). Orlikowski and Iacono conceptualise the ensemble view of technology with four variants: technology as a development project, production network, an embedded system and technology as a structure but all converging on ‘the dynamic interactions between people and technology, whether during construction, implementation, or use in organisations’ (2001, p. 126). We pursue a conceptualisation of the interactions between the numerous material and human entities: CRM technologies, techniques, data, call center staff, managers and customers, and forms of monitoring and control. This monitoring and control could be seen as loosely allied to the technology as embedded system enmeshed with the conditions of its use.

The second section focuses on some of the responses of management and CSRs to CRM and staff monitoring in our case study organisations. Questions are raised about the effectiveness of CRM and its inexorable pursuit of a technologically simulated, mimetic model of the customer. Space permits only a few examples of where the mimetic

model would seem to deny or violate any reasonable knowledge of the situation as perceived by ‘front line’ CSRs. Although senior managers appear to be captivated by the competitive advantages of corporate branding that CRM makes possible, call center representatives and customers often resist its effects and even some managers, charged with its implementation, exhibit degrees of ambivalence about its utility. Part of the problem as we illustrate in the analysis is that, as Kallinikos (1999, p. 264) makes clear, ‘computer-based representations need to be comprehended (the issue of sense) and related to states or processes of the referential world (the issue of reference)’. In this section, we turn more closely to interview material from our case studies to illustrate where the magic of mimesis breaks down in practice and where some of the imperatives of the technology, though not the technology itself may be “ignored, resisted or reshaped” (Kallinikos, 2007, p. 2).

This is partly to reverse Kallinikos’s (2007) point because he wants to resist the voluntarist or humanist view that technologies or systems can be readily overturned or resisted where there is the human will to do so. We say partly because overall we agree with him that technology is a “recalcitrant ally” in that systems of communication (e.g. telephone and media), transport (e.g. airlines, rail networks and road systems) and utilities (e.g. electricity, gas, the computer and the Internet) have become irreversible actor networks (Calton, 1991; Latour, 2005). Their virtually indisputable and indispensable benefits render them universal and our transformation as subjects enrolls us all into their networks and disciplines to comply with their standards even in advance of knowing what they are. They are, as Kallinikos (2007, p. 3) points out, beyond the level of “contextual encounters”.

However, such systems do not preclude particular applications failing to meet cultural expectations or sufficient endorsements, enrolments and mobilisations of resources to secure ‘obligatory passage’ status, let alone the stability and obduracy of irreversibility. History is scattered with examples of such failures (e.g. the central vacuum cleaner, the waterless toilet, the electric car, the absorption (gas) fridge, the electronic purse) even when as in the latter two cases they were technically superior to the alternative compression (electric) fridge and physical cash (see Schwartz Cowan, 1985 quoted in Knights, Noble, Vurdubakis, & Willmott, 2007; Vurdubakis, 2007). Although the jury is still out, customer relationship management (CRM) may be one such application.

2. Managing call centers

Despite diversity in the literature on managing call centers, a common theme has been to show how work intensification and workplace surveillance is achieved primarily through the time and target pressures that are facilitated by technology (Taylor & Bain, 2005). The ‘gaze’ of the electronic boards displaying their unceasing demands on staff combined with tele-computing and the automatic distribution of calls (ACD) ensures that backlogs are always driving performance. This is perpetuated through the accumulation of electronic databases that capture in digital form the behaviour of customers and customer service representatives (CSRs) at the point of interaction in service/sales encounters. It is capable of translating a whole series of material and symbolic interactive events into a digitised set of numbers, categories or forms.

Both in the literature but also among practitioners (Knights & Odih, 2002), this high level of technological and target surveillance has been seen to have potentially counterproductive effects. For such intensive electronic surveillance and management control neglects the degree to which labour has to be developed as a subjective, cooperative force (Cressey

& MacInnes, 1980, p. 15). Researchers then began to identify tensions in the management of call centers around a concern with quantity of production or output performance and service quality (Bain, Watson, Mulvey, Taylor, & Gall, 2001; Knights & Odih, 2002; Korczynski, 2001, 2002). This tension can be particularly acute where an organisation is seeking to shift its strategy in the direction of securing a corporate brand image on the basis of customer service (Alferoff & Knights, 2002). However, the concern with customer service has not necessarily led to more relaxed levels of surveillance and management control, particularly when customer relationship management (CRM) is invoked.

There are various strands to the CRM literature, with some using the term synonymously with 'relationship marketing' (Wilson, Daniel, & McDonald, 2002), or merely as an extension of the branding process (de Chernatony & Dall'Omo Riley, 1998). According to a survey carried out by software specialists, 65% of marketing managers surveyed used a call center as part of their marketing strategy (Noetica, 2002 cited in ContactCenterWorld, 2002). Many marketing managers set regular targets for the call center to fulfil in addition to submitting daily activity reports (Noetica, 2002, cited in ContactCenterWorld, 2002). Such increases in accountability may not, however, be without costs. As we demonstrate later in the paper, the weekly meetings to discuss sales and quality of service statistics were the cause of considerable tensions not only between call center representatives and managers, but also among call center managers themselves. Front line managers and supervisors argued that the statistics did not fairly represent the efforts made by their staff to meet the more complex of customer queries and demands.

Through a small range of in-depth interviews with call center staff outside of their organisations, Richardson and Howcroft (2005) sought to examine the ways that call center staff are affected by the demands of CRM and the attempts to routinize their labour through it. Our research contrasts with theirs in focusing on the actual content of the CRM technology and being informed by an analytical perspective on power and identity/subjectivity (Foucault, 1982). This is to see CRM as a technology of the self (Foucault, 1988a, 1988b) that management anticipate will transform individual CSRs and customers into subjects that secure their sense of meaning, identity/subjectivity, and reality by identifying with the practices and demands that the system imposes (Knights, 1992, 2002). This is what we mean by a *colonisation of identity*.

Deploying CRM databases seems to offer management the best of all worlds yet as we shall see, it is increasingly brought into the service of management control rather than its relaxation. There is, however, a tension for managers of seeking to relax controls in order to secure a commitment to customer service, on the one hand, and, fearing such relaxation because of its potential to erode productivity standards, on the other (Knights & Odih, 2002). CRM may help to resolve this tension by enabling managers not only to manage at a distance but also through distance (Fournier & Munro, 2006). When staff are in a relationship with customers from outside the organisation, managing at a distance is unavoidable but CRM seems to transform a necessity into a virtue, allowing managers to distance themselves from the control that now becomes embedded in the [CRM] technology. This 'impersonalises the authorship of the system and so makes control less vulnerable to criticism' (Cooper, 1991, p. 255).

The distinctiveness of these databases is to bring together themes on technology driven customer relationship management and service in relation to the possibility of a *colonisation of identity*. That is to say, the sense that both CSR's and their customers have of themselves can be heavily conditioned by the use and effect of CRM databases. Not that they

are entirely successful as we shall eventually show, but CRM severely circumscribes how a CSR is to interact with customers in accordance with how they have been simulated in a mimetic, or representational model of their identity. This is produced through mining customer databases of past patterns of consumption to reproduce the identity of the customer as supposedly reflecting that with which they identify. Here we call upon Taussig's description of the mimesis as the faculty to copy, imitate, make models that come close to the character of the individual and are perceived as potentially powerful enough to act as stand-ins for the original (1993).

It is our overall argument that the manipulations of data by managers in call centers is increasingly designed to master and maintain the content of service and sales encounters that might otherwise become 'off-limits' in terms of management control. Off limits because service and sales encounters are of such an intangible, complex, unique, and elusive character as to render them wholly unpredictable events that defy detailed regimentation outside of reducing them to mechanical scripts or automatic voice recognition systems, both of which defeat the purpose of employing human agency.

This argument is elaborated through an examination of the data mining process of customer relationship management (CRM) from initial incoming call to an on screen prompt about what to offer the customer. CRM is an approach that brings together three functions: information technology, marketing, and customer service in a holistic strategy designed to forge an intimate relationship with the customer. The objective underlying the use of this sophisticated software is to '(b)uild a complete picture of each customer's values and needs' (Brains Express, 2001). This 'observation before the fact resembles an informed form of stereotyping' (Bogard, 1996, p. 27) that is becoming increasingly important in targeting individuals for specialised messages. It is a strategy fostered by high levels of service quality allied to sophisticated data collection (Ecsoft & Chordiant, 1999). This synchronicity is the feature that takes it beyond marketing strategies based on merely segmenting customers into loose categories. In matching live customers with electronic data about them and their behaviour through tele-computing facilities, call centers would *appear* to offer superlative opportunities for CRM in the pursuit of increases in sales productivity and profits.¹

3. Methodology and methods

While following some fairly conventional methods of data collection, our methodology is constructivist rather than representational. That is to say, theoretical concepts are considered crucial and although these sometimes arise out of the data as, for example, the 'People-by-numbers' a phrase used metaphorically to imply that customers are reduced to digitised categories not dissimilarly from the number rather than name given to the incarcerated. The CRM machine's presence on the VDU screen (see Fig. 1) overrides the CSR's power of interpretation most of the time. Invariably such concepts structure and frame how and what data is selected for analysis.

Already a number of these concepts have been introduced through the literature review. The 'colonisation of identities' is one such concept referring to how CRM seeks to trans-

¹ We recognise that the contact with a call center may be only one in a series of exchanges between the company and its target audience and may have been preceded and/or been followed by targeted mail and discounts, or data collected from stores, or other outlets. Here, however, we focus only on CRM within the call center environment.

The paper is based on research in five case study call centers: two catalogue companies, two financial services organisations and a communications company. The methods included research interviews with management and staff, various forms of observation, and the collection of both internal and external documentary materials. In these call centers, CRM was data driven but directed specifically at improving overall sales of products or services. This has become of increasing importance as marketing managers are pressured to justify their costs, utilising direct mail and/or call centers in place of former strategies (Wilson et al., 2002). Brief details of the number of staff and activities of these organisations are given in Table 1.

Over a period of about nineteen months, 104 in-depth interviews – varying in length from 30 min to one and a half hours were taped with senior operational and line managers, customer service representatives and members of resources teams. In all we spent 9 days at the first of our case study organisation, TCC, 5 full days at Finserver, 41/2 days at Niche, 6 days at Bigbook, and 3 days at Starico. We interviewed – one owner/MD male, two call center managers, one male and one female, one male regional manager, three male operations managers, one female communications manager, nine training, HRM or personnel managers, two male and seven female, one central support manager, male, I female merchandising manager, two male marketing managers, one production co-ordinator, male, four members of resource team, two male and two female, nineteen team leaders/managers, two male and seventeen female, two male and two female customer service managers, five coaches, three female and two male, one female member of a core critique team, thirty-seven female CSRs and nineteen male CSRs. We did not ask for people's ages. We collected documentary data in the form of trackers for monitoring or coaching purposes, data on customer satisfaction, weekly sales performance, coaching tools and strategic change programmes.

Interviews also took place at corporate head offices with a senior sales manager, a planning manager and a managing director. These face-to-face interviews were supplemented by telephone interviews with three marketing managers. We were also able to attend two management meetings, listen-in to calls and sit in on coaching sessions and a core critique, remote monitoring, session. While the case studies inform both sections of the paper, it is in the second section where we use the interview and observational data more intensively.

The paper relies on data collected on the content of the customer/call center representative encounter and its aftermath from within the call center. As a consequence, the sense in which customers' identities are captured or colonised by CRM has to be inferred from these encounters and our interviews with call center staff.

Table 1
Case study organisations

Call center	CSRs	Streams
Bigbook home retail	1200	Telephone ordering, helpdesk, telemarketing
Starico telebank	400	Sales, customer service
Finserver telephone banking	250 FTE ^a	Customer service and sales
TCC customer service centre	200	Helpdesk, customer service
Niche	54 Seats (approx. 100 staff).	Telephone ordering, internet administration

^a Different measures were used in our case study organisations. Some used full-time equivalence, others number of seats and others personnel employed in the call center.

4. Mastering the service and sales encounter through data

4.1. Re-aligning the lens of service quality

We acknowledge that the intensity of monitoring may vary from one organisation to another according to the nature and complexity of the task (Frenkel, Korczynski, Shire, & Tam, 1999) and in cases where monitoring is used purely for the purposes of performance review, it may be local and limited (Lankshear, Cook, Coates, & Button, 2001). However, we found that the change process associated with the introduction of new forms of managing the customer relationship in our case studies was generally accompanied by an additional scrutiny of staff. Managers tape record the service encounter not only for the purposes of training, but also to closely monitor the CSRs. Advanced systems of monitoring synonymous with the introduction of CRM can take real-time surveillance to new levels of intensity. By analysing the CSR/caller interaction and evaluating the agent's selling skills, surveillance can be utilised in training to seek to eliminate the weaknesses and elaborate the strengths of staff in service and sales encounters. Recording begins when the CSR starts:

'entering data into a specific field in a company's customer information system or other enterprise application such as human resources or helpdesk function. Organisations can (then) proactively target vital information to help maximise this revenue and customer satisfaction' (CallCenterWorld, 1999).

As with the panopticon, the sheer awareness of the recording and that it may be examined in detail by management is sufficient to ensure considerable self-discipline (Knights & McCabe, 2003), or 'productive soul training'. However, on the downside, it is 'a low-trust strategy that can reinforce the very work-to-rule behaviour that the demand for quality in customer service needs to eradicate. In order to improve service quality, CSRs in some of the organisations analysed in this paper were encouraged to chat more informally to customers in the course of the call. However, they were fully aware of the constant monitoring to ensure their conformity to a structured call plan and standards of helpfulness or politeness. Increasingly, though, the significant elements of the call come in the add-on sale, driven by the prompt on the CSR's screen that is generated through the company having previously data mined the particular customer's profile and matching this to the live service encounter (see Fig. 1). Informatting work is not just based on the customer; it extends to the CSR's themselves. Simple forms of staff productivity measures based on number of calls taken, leads generated, or products sold have now been complemented by quality customer care controls that attempt to apply scientific-rational (Jacques, 1999) precepts to such intangibles as 'politeness' or 'empathy'. At one level, this concern with 'empathy' and the social content of service encounters appears as a welcome humanistic development and can readily be sold to staff as a 'hearts and minds' (identity) issue. But the process of evaluating calls remains within a digitised 'people-by-numbers' format and is often a way of removing, or minimising the uncertain and unpredictable, human dimension from call center work.

4.2. The service encounter and datamining (see Fig. 1)

Data gathered from recordings of the service encounter is used as an evaluation tool internally to the organisation in assessing individual and team performance within the call

center. There is a two-way flow of data between the CSR's and both the Resource Planning and the Resource Monitoring or 'listening-in' teams – dataflow (2) in Fig. 1. So both the activity (e.g. engaged in, waiting, or unavailable for a call) and the performance (e.g. success rate in sales, conformity with call structure) are measured and analysed. Accumulated data can then be used to evaluate not only the CSR's conversation with the customer on line, but also whether he or she has responded to the prompts on the computer screen in the appropriate manner. Statistics are compiled from both sources and added to data collected from customer satisfaction measures and presented at management meetings to evaluate the performance of the site in terms of sales achieved, or customers' satisfaction with service provision. Extra meetings may also be timetabled to assess the success of change programmes using similar measures of performance, but in greater detail.

Data collected during the course of the customer's interaction with the call center is accumulated historically and then mined and processed and, from a selection of this data, algorithms are produced to direct the content of the encounter (i.e. screen prompt) and that of further calls – dataflow (1) in Fig. 1. Data mining refers to an accumulation of materials and data that is collected prior to any single encounter from data files held on the customer from a variety of historical encounters and psycho-, socio- and geodemo-graphic materials. This is made possible largely by advances in information technology where data kept on separate files can be mined and merged to add a further opportunity to the organisation in capturing, normalising, warehousing, cubing, dicing and slicing customer information. It is then overlaid by customer profiles from relational databases (Berry & Linoff, 2000) and represented to call center staff in the form of a history and contemporary mimetic simulation of the individual customer. The following diagram shows the two types of dataflow.

4.3. *Mimesis and customer relationship management*

What we seek to demonstrate in Fig. 1 is the way that the information, or *dataflows* have the capacity to transform participants in the interaction into simulations. The objective underlying customer relationship management (CRM) is to deploy datamining as a means of turning the myriad records of a company's customer databases into some sort of coherent picture – a mimetic model – of its customers (Berry & Linoff, 2000). As such, this form of computerised customer profile reflects not just a technology of surveillance, where the actions of the customer on the phone and the appropriateness of the CSA's responses are captured in real time, but also a surveillance in advance of surveillance, a technology of observation before the fact (Bogard, 1996), where historical information on the customer was observed, captured and collated so as to inform the current encounter. Information on the behaviour of the CSA is also collected and accumulated and presented at team meetings and informs future monitoring and training sessions. Even so, the aim is clearly to forge a relationship between this targeted individual and the company that opens up opportunities for profit for the organisation in question. The intention of CRM now is to take the relationship to a depth of intimacy beyond managing 'accounts' and 'marketing' to 'segments' (Web-based promotional material – name withheld for purposes of promised anonymity).

A 'courtship' is simulated that aims to establish a long-term relationship and loyalty of the customer to the company. We use the term courtship here in the sense that CRM aims to anticipate the customer's desires and needs and this might be seen as analogous to the

seductions of a lover. Of course, we use this analogy with a touch of irony since it is rare that the reduction of a person to a set of desires or needs abstracted from their relations in everyday life is going to be seductively convincing. Nonetheless, it is an improvement on the relatively arbitrary and random gaze of segmentation, where consumers are reduced to generalised categories of persons in relation to their age, sex, class, religion or other broad attribute. At least CRM attempts to personalise and customise through its close focus on details of the behaviour and attitudes of particular customers, albeit these are usually disaggregated and re-aggregated communities of ideal customers based on the merging and mining of several data files. Necessarily, the image that is produced is only a re-assembly of bits of information on an idealised customer. Objectives are programmed into the system that is based on evaluative and prescriptive measures (Lyotard, 1986; Melberg, 1995) designed to render predictable the behaviour of both customers and call center staff. There is a considerable distance between the model and the ‘real’ live person. CRM may be seen as closer to the edited image in film making than to an artistic masterpiece but it attempts to push beyond broad-brush marketing techniques, and would appear to be aiming to produce a likeness with which the customer can identify.

Advocates of CRM support its application since companies that do not have product leadership, for example, may combine operational excellence and customer intimacy (*in the attempt*) to create value (Chenet, 2001). For purposes of competitive advantage, differentiation in call centers relies on the quality of front line staff that are expected to ‘impersonate’ successfully the corporate brand to meet the expectations of ever more demanding customers (de Chernatony, 2001; de Chernatony & Dall’Omo Riley, 1998). CRM is the vehicle not only for customising the product offering but also a means of generating loyalty to the brand. But these processes are not without their tensions. In relation to staff, these have been intimated already as revolving around the twin and sometimes-inconsistent demands of quality service, and rigorous technological surveillance and control (Korczyński, 2001). But the detailed use of statistical data and information on both behaviour and performance is not just a problem for call center staff and their customers. Call center line managers and supervisors are also aware of the tensions between ‘Tailorisation’ and ‘Taylorism’ (Korczyński, 2001) based on the positivistic use of statistical data.

In our case study organisations, the contradictions were a topic of debate at team leader and management meetings, as we demonstrate later in this paper. These were inherent in shifts between the co-present dual logics (Korczyński, 2001) of efficiency judged on accumulated statistics gathered from various dataflows, and customer-orientation based on close observation of the team. While our focus here is not primarily on the customer’s experience of CRM, when listening-in to calls in our case study organisations there was evidence of customers also perceiving a disjuncture between their ‘needs’ and corporate practice. Customers may, for whatever reason, prevent the use of the CRM mimetic model by terminating the call before the CSR had the opportunity to offer an add-on product or service. Possibly they become exhausted with the multiplicity of one-to-one relationships with which they are expected to engage (Fournier, Dobscha, & Glennick, 1998), especially as call centers increase the volume of outbound calls in search of further business. This signals that the marketing strategies of the mimetic modelling of customers deployed at-a-distance, may have unpredictable and unexpected effects. Despite the sophisticated and scientific strategies deployed by CRM specialists, the subjectivity of customers can rarely be wholly captured and controlled.

5. The everyday experience of customer relationship management (CRM): the case studies

It goes without saying that, for all of our case study organisations, much of the CRM design and at least some activities in the form of direct mailings, datamining techniques and so on, are the concern of marketing and information technology departments. At the chalk-face, it is call center staff who are often the first point of contact between the customer and the company. In this section we give brief details of the activities of the four call centers and the programmes and systems that are set up to improve the customer experience. This remark on improving the relationship with customers is typical of the aspirations behind the introduction of various forms of CRM in all four companies. It is clearly about getting advisors not to sacrifice quality in order to avoid backlogs of calls:

I think the skill is in building a relationship with the customer. In the customer service area, we had a high turnover of calls – very, very busy – but if we’re going to be able to cross sell, we need to establish a special relationship with customers. Our advisors have got to learn how to strike up that special relationship and not let the pressure of queries queuing up – customers shouting when they’re coming through leading resulting in “got to get this one off so I can answer the next,” rather than thinking, “right, that’s not my problem”. (New Business Manager, Starico, edited in order to ensure comprehensibility.)

5.1. *The telecommunications company (TTC)*

At TCC, the telecommunications company, staff take three streams of incoming service calls from customers: billing, helpdesk and calls and access (a service sub-contracted by a direct banking operation). The major activity at this call center is service, telesales takes place elsewhere, nevertheless CSR are expected to promote products and services as an add-on to the call. At the time of the research this site was some way into a pilot initiative designed to improve customer satisfaction, reduce repeat calls and improve the headline revenue target. Performance was assessed internally through a new system, RT1000 (Resource Two 1000 Windows based), which is simply a terminal linked to the telephone system. The calls were also monitored remotely through a research agency using an Event Driven Customer Satisfaction Measure. The research agency accessed details of customers who had placed an order or made a complaint and contacted them. After analysing the EDCSM data, performance was passed back to the TCC site.

5.2. *The (Niche) fashion catalogue company*

At the time of the research, Niche took incoming ordering and service calls emanating from a catalogue. Building close customer relationships has informed policy from the outset at the fashion catalogue company, Niche, although it is only recently that the managing director has considered using outside agencies to provide geo-demographic and lifestyle data to enrich customer information captured internally and utilised to target special offers and discounts to selected customers. This small company only has the one call center at present.

5.3. *The bank (Finserver)*

Staff at Finserver respond to calls on three products: cards, current accounts, and insurance as well as attempting to cross-sell on all calls. Finserver has a well-established programme of CRM and the present quality programme is one of a series designed to improve the customer experience at all touch-points of the organisation. According to a CRM specialist at Finserver, the customer database is updated on a monthly basis with feeds from the legacy system and from data that is bought in – either on a regular basis, or intermittent refreshes and updating of information that is relatively stable. This includes geo-demographic data and feeds from suppliers such as Experian. As was common practice amongst the call centers participating in the research, recent changes involved streamlining the customer/call center experience by integrating the sales and helpdesk functions. The centralised system delivered calls to the various sites according to availability. Finserver was introducing one-stop-shopping so as to avoid the frustrating delays formerly experienced by customers as they waited to be handed on to another site able to deal with their queries. Call center staff were being trained by way of a rolling programme of multi-skilling. A second aim of the training was to further improve the customer experience by ameliorating the aggressive and competitive sales tactics deployed by a group of CSAs. All customer-facing staff were undergoing training in more closely matching sales to customer needs. A customer information system was available to customer-facing staff which provided an overview of the customer relationship and key profile information designed to promote staff in developing the relationship. This was in addition to the operating screens linked into the system giving details of transactions and account behaviour. The same systems offered prompts to the staff member based on customer data and the best prospective for a given product sale.

5.4. *The large catalogue company (Bigbook)*

Bigbook, the larger mail order catalogue has, until recently, relied on its massive customer base to deliver the desired outcomes in terms of sales. The decline of home shopping in toto has forced an evaluation of strategy. The company is moving away from mass marketing for the bulk of its customers and segmenting out high-value customers for selective services and is now, according to one planning manager, adopting a more complex approach to all of its customers. The new strategy for both inbound and outbound calls involved a Zuess system. Although in its early stages, a targeted CRM strategy was being trialled, which involved gathering factual data around past purchases and blending it with bought – in lifestyle data from 3000 customers. Changes to inbound calls involved up-selling on ordering calls. On outbound marketing calls, data were captured on initial reactions to targeted, niche catalogues from different categories of customers. Two additional major strategies were in the process of being introduced: Targeting products on direct shopping, and distribution through category managers. Most customer service representatives in telephone ordering will, in the future, field calls generated by targeted mailings not only resulting from the large home shopping catalogue but also from various smaller, more tailored catalogues. They cross or upsell on the various catalogue calls and are expected to generate leads for the financial services arm of the company. Additionally, although many calls are routine, where there has been a breakdown in supply, or delivery, they are now expected to deal with warehousing and distribution contractors on the customer's behalf.

5.5. *The retail financial services company (Starico)*

The Starico call center takes inbound calls on credit cards, travel insurance and loans. Starico has not introduced a single, operational CRM system, rather the process has been built in-house, “cobbled together over a number of years” (marketing manager Starico). The customer file was built in-house and this file picks up most of the data from operational feeds. A back-end analytical customer data warehouse pulls together the single customer view-card and feeds the customer data prompts. Prompts are vertically loaded and vary in terms of text quality, thus informing the CSR as to the appropriate action with at the top of the hierarchy, a five-star offer based on a ‘customer profitability proxy’. By taking the advanced technological route to managing the customer relationship and increasing targeted sales, Starico represents a partial retreat from relying principally on the quality of service to deliver the required level of sales in the call center operation. The new strategy integrated sales and service functions into one stream and integrated telesales into the main operation. Under the new system advisors were expected to cross-sell whenever the opportunity arose. Data on customers emerged from a number of sources merging internal data with externally held Experian databases. Outbound calls would be either follow-up calls, or working a database of people who fell into the right criteria. The new management information system also collected data on performance using the calls per hour measure and cascaded the full data summaries down as far as team level where it was conveyed to advisors.

6. Analysis of the case studies

6.1. *Internal monitoring of the service encounter*

In both Finserver and TCC, monitoring the CSR/customer interaction has increased and changed. Whereas time or overall sales were indicators of conformity prior to the new initiatives, spotlighting service quality has amplified the concentration on the practice and content of the call. In contrast, at Niche monitoring for service quality has been an ongoing commitment. Decisions on monitoring are under review at Bigbook, but the planned changes are too recent for informed comment. Presently, CSRs are monitored for politeness and attention to the customer’s needs, but apart from a requirement that they use the correct salutation and closure to the call, the volume of calls takes priority in phone ordering and helpdesk. In order to give a more ‘natural’ feel to the encounter, the restrictive format of the script used in telemarketing has given way to bullet points, or a ‘cookery card’ guide to call procedure. It is often the case that companies embarking on customer care or service programmes allow some (albeit limited) leeway in the way that calls are conducted. This is to facilitate a service that customers can recognise as human rather than appearing robotic.

6.2. *Performance evaluation*

Under the old performance indicators – time measurement in TCC and sales figures in Finserver – monitoring the *content* of the call had not taken priority. Reaching the desired targets was a direct relationship between either the length of time the CSR spent on a call, or the number of sales per shift. Bigbook telephone ordering still largely evaluates CSRs

on their success in meeting targets in relation to calls per shift. At Starico, the level of monitoring for compliance to a call outline has increased, but this is against a background of a calls-per-hour (CPH) performance target. In the following quote a customer service manager (CSM) expresses some concerns about this burden of surveillance on CSRs:

“CPH gives us a single measure. I’ve always found that the fewer number of measures that we can have the more likely it is that we are actually going to achieve those. So, if we could find the measures that actually build up into the overall, more complex budget, then that allows us to focus a lot more. However, I think, because we’re going through this sales revolution, if you like, we need to be encouraging people, or getting the messages right. Because, if you go for CPH, then you’re actually saying to somebody, “we want you to build rapport, but we don’t want you to do too much.” It’s a mixed message” (Terry, CSM Starico 12.11.01).

As stated earlier, with the changes to quality programmes at Finserver and TCC, reductions in either time or sales as indicators of performance were accompanied by a marked increase in the monitoring of CSRs. In particular, this was focused on the content of calls and the appropriateness of CSRs use of the computer screens, especially the sales prompt (see Fig. 1). In the following extract Ruby from the ‘Core Critique’ remote listening team at Finserver is monitoring a call. She comments on the CSR’s response to the prompt that is appearing at the bottom of the screen:

“And that’s telling us to sell a money back card, so these are supposed to be looked at, but they’ve got to be applicable to the customer. What I will do is – they haven’t actually got a Visa card I would see if they’ve been sold one recently. Check on that which is fine - should have gone for that, but it’s a bit debatable, ‘cos if she doesn’t like having a debit card, she is not going to really like having a Visa card. So, I’ll put that down as not applicable” (Ruby, Remote listening team 16.01.01).

The CSR who is being monitored has chosen not to promote the money back card on the basis that the customer has refused a Debit card and it would seem pointless to promote a similar product such as a credit card. Unprepared to accept the pressure of sales targets at almost any cost, this CSR has chosen to ignore the prompt. Fortunately her manager Ruby agrees with her decision not to promote the card and says that ‘she dealt with the call well’. Although organisations do constitute subjectivity such that individuals are transformed into subjects that secure themselves through complying with their technologies, this transformation is rarely so exhaustive as to render staff robotic and unable to disregard or seen to modify the imperatives of technology where that seems appropriate.

At two of the organisations Finserver and TCC, we were able to observe management meetings at which the primary topic of discussion turned out to be the statistics derived from remote monitoring. In both cases, opinion was divided on the value of such pinpointed measurement of limited, and the neglect of other, elements of the CSR’s overall performance. The meeting of Finserver team managers and the customer service manager, who initially designed the programme, was held at the end of the first week of the rollout from the initial pilot team. At this time, the customer service trial covered 50% of teams in the call center. The main concerns to be addressed at the meeting were a fall in the sales figures for the site as a whole, the re-design of the incentive and the statistics on CSR compliance with the call structure produced from the remote-monitoring team. There was an

acceptance that sales figures would naturally fall with the change as CSRs were allowed additional time in dealing with the customer query. Sales had fallen from approximately 14–15 incentive points per hour to average at 12 points per hour. This highlights the narrow line between helping the customer and breaking the rules on meeting targets. Dealing with a query frequently involves contacting other departments or units that may not have the required information to hand, and this necessarily eats into the CSR's time pressured targets.

In the meetings at both companies, team leaders argued that the remote monitoring was affecting morale. CSRs were "getting paranoid" about the statistics presented each week and asserting that there must be "something wrong with the objectives". Complaints were not only directed at the level of surveillance, but also at the call format and CSRs from both organisations complained that they were "not robots". At Finserver, dissatisfaction with both the drop in sales incentives and the level of surveillance were leading some CSRs to retreat into the type of aggressive selling practices that senior managers had previously devised the customer care programme to eradicate.

At TCC the helpdesk site bears the brunt of any customer dissatisfactions, especially concerning other parts of the firm such as telemarketing and distribution. The quality trial was an attempt to reduce repeat calls and improve overall customer satisfaction with the company. As with Finserver, it was perceived as essential that CSRs followed the structured call formats in order to maintain the corporate brand. Statistics generated from the remote monitoring site indicated that initial improvements in performance had plateaued. In the ensuing discussion, the conflict between autonomy and control was raised, much in the same fashion as at Finserver. A few senior managers and the coaching manager were adamant that CSRs should comply with the call format. By contrast, other customer service managers and team managers were concerned to emphasise how greater CSR autonomy in handling calls enabled them to resolve customers' queries more satisfactorily.

Attempting to measure the content rather than correct performance of the structured elements of the caller/ CSR encounter was rudimentary at best, and was the source of continuing debate between different levels of managers in all the organisations referred to in this paper. This team manager at TCC expresses his frustration at the unwillingness of CSRs to use the correct salutation which he considers to be an important element in corporate branding:

"We are a big brand we're a big company, we're a huge company and we're a hugely successful brand and, if you like, if you went into Harrods shopping everyone's proud to walk out with a Harrods shopping bag and that's to say, "hey, I've been shopping at Harrods, and I'm pleased to be there". And we're only doing the same, we're just branding our product. Why CSAs don't do it, I don't know" (06.06.00).

The most common management approach to the introduction of customer service initiatives was to focus on the compliance elements of the call since these were more readily measured. Consequently, they tended to neglect the input in terms of problem-solving and relationship-building skills that CSRs were encouraged to employ in meeting customer demands. Reflecting on the impossibility of delivering all that is required from her, this CSR says:

"How can you have statistics on each option? Individuality and customer service and then put up your statistics? I mean, surely the two of them of them don't mix. You've

got to have 70% of this, that and the other, but... it's like they are saying every call should be individual and you should treat the customer like an individual, but then they say you should open the call in exactly the same way and close it in exactly the same way. It's like you are talking to a robot, people have said to me "are you an actual person or are you a computer?" (Lesley, CSR, TCC 31/05/00).

Not surprisingly, disillusionment tended to set in amongst CSRs and their immediate supervisors who bore responsibility for the team's performance. Senior managers pursued various strategies to try and eliminate the tensions aroused. In some cases these strategies accorded with, but in others represented a retreat from, the CRM principles of targeted selling and differentiation through distinctive service. In effect, these diametrically opposed responses might be seen as illustrating some of the incompatibilities between the technological, number-driven and the human, customer-focused demands of CRM.

In order to deal with the problem, Finserver management introduced an easily measurable element to the call. This came in the form of a product that was deemed to have universal appeal and could be promoted on the majority of calls. Given that CRM is about customised, not universal products, this was its exact anti-thesis. The product was introduced partially to dampen down disquiet around the loss of sales incentive points. Restoring an easily attainable incentive helped to defray the tensions regarding CSR's growing dissatisfaction with the feedback from the remote monitoring team. These tensions had begun to be disruptive in threatening the success of the customer service trial.

6.3. *Missing targets*

Listening-in to over 70 service encounter calls across our case study sites indicated that, in many situations, the data collected on customers is not put to use in promoting products or services. Berry and Linoff suggest that '95% of people picked as likely to respond to an offer will not respond' (2000, p. 20). Often calls are either routine enquiries, or generated by staff at branch level and offered little opportunity to extend the encounter. Customers may take control by terminating the call summarily. Customer service representatives often make judgements as to whether to attempt a sale based not only on the information and prompt on their screens, but also on past experience. Respondents to interviews said that they could judge if a customer was in a hurry, or unlikely to take up an offer and would collude with the customer by letting them go without promoting a product, service or discount. As we have already indicated, companies are now deploying CRM techniques to target individual customers more closely. While the customer data is enriched (i.e. connected to other data about the customer and their geodemographic and social status) both internally and externally, the outcome of this data capture often bears a parallel relationship to that between an original art work and what can be produced through a kit. Customer relationship management of this type is:

"In contradiction with business strategy (it is) making as much money as you physically, can in the short term. Our inbound calls used to be care and service calls, now we need to get the sale immediately. On inbound calls this will mean a change to how

calls come in and in the way that offers are made. The key thing is to make a sale anyway, to up-sell a product” (Planning Manager, Bigbook 23/06/01).

In doing so, it is quite possible to miss performance targets by a significant margin; this marketing manager from Starico likens the outcome to setting off from London to make a journey to Scotland without a map and travelling in a generally northerly direction, but:

“(S)omebody didn’t bother to tell you whether you were driving to Aberdeen, Edinburgh, or Glasgow. You don’t know where you are going, you can’t really measure what success you’ve had against actually getting there and I think that is the curse of many CRM programmes. It works when you actually know what you’re wanting it to deliver, but it doesn’t work when it is some sort of panacea for wider corporate ills; a silver bullet.”

In practice, this means that when offers are made they may be quite inappropriate to the customer’s ‘needs’ and may thereby undermine any attempt at service quality. Although customers may be aware that data is held on them, maladroit usage implies that the company does not in fact, “have a clue about me as a customer, or you wouldn’t be doing this” (Marketing Manager, Finserver).

Listening in to a call with a CSR at Starico where the enquiry was for a loan, the screen prompt suggested offering a home contents insurance. In doing this, the CSR lost the customer’s interest in both products. The following excerpt from a CSR at Finserver indicates that CSRs have to cope with what they consider inappropriate CRM-driven screen prompts. Here the prompt on the screen told the CSR to offer a loan despite the fact that her customer has £10,000 on deposit:

“We have the customer information – you know, you log in the account and it tells you what to promote, and I’ve found quite often it will say ‘download’, and when you look into the account there might be £10,000 in a savings account” (Mattie, CSR 15.01.01).

In this case she sensibly disregards the prompt. Apart from contradictions of this kind, CRM-driven screen prompts can provoke a psychological dilemma for the CSR. While designed to promote a tailored and targeted product or service, the customer is unaware of the ‘Other’ (i.e. the prompt) appearing at the bottom of the CSR’s screen. The dual responsibility of delivering a quality service and at the same time responding to the screen prompt in order to meet performance targets on sales generates some tensions in negotiating the encounter with the customer. This is especially so where time-discipline (Knights & Odih, 2002) still remains a management control. In the small catalogue company, Niche, calls are not timed, but ‘unavailable’ time (i.e. when not available to take another call) is measured. In the following quote two CSRs discuss the problem that CRM codes for discounts to particular customers creates for their time performance, but also, interestingly, how a CSR might use their discretion partly to comply with the time pressures:

Juan “In Niche we have these codes-AAA, KKK – 10% off here, 6% off here. Well, all of these add to the time it takes to take an order and, the screwiest thing, I’ll tell you why, it’s because customers ring up and will say, ‘Well, my friend down the road’...”
Ash: “You’ll get customers who ring and say, ‘My friend got this code. Why aren’t I getting it?’” And you’ll spend 2 min arguing with them, saying. “Well, that’s your allocation code”.

Juan: “What I’ve got criticised for – I say, “Well, if you want this 10% off, you can have it!” I’ll say (when criticised by the supervisor) “I got off the phone in a minute and a half and they were pleased to get the 10% off,” but the company, they see the AAA–KKK codes is a marketing tool to get people to buy things”.

This also provides an example of how CRM, used as a basis for customer discrimination, is dependent on the disaggregated community (Reynolds & Alferoff, 1999) remaining disaggregated. In this case two friends, both customers of Niche, have met and discussed the discounts the company has offered them. Realising that she has been offered a less attractive discount, one of them has phoned the call center to protest and the outcome is as Juan describes.

Call centers are becoming increasingly sales-driven and in the search for sales they offer unparalleled opportunities to reach customers and attempt an offer on what is frequently a care and service call. Supposedly, customers are becoming increasingly selective and CRM is the solution that allows the company to manipulate factual and lifestyle data on that representation of the customer and to present offers that are deemed to prove attractive, whether in terms of an outright sale, or in the form of an incentive. This is representation in the sense described by Kallinikos (1995) where neither ‘individual elements or representations as a system (discourse) capture and refer to tangible totalities’ (ibid. 136). The data may be statistically correct, but people are unpredictable and such offers are often wide of the mark and, as a result, customers resist the sale and speculate about the proxy in the background as a shadowy presence. This is something that is recognised not only by call center staff who may resist the pressure of the prompt, but also by marketing and planning managers who are ambivalent about the overall value of CRM. Although there has been a degree of isomorphism in the adoption of this strategy; in the future, for advisors:

“(I)t’s probably going to polarise between trying to develop customer relationships and treating them in a commoditized fashion, “we will just service your call”. With the commoditized customer, helpdesks are not part of the deal, but for other generally more complex calls it is becoming increasingly essential. You have to manage the expectations of these different types of customer. It depends on what part of the market you’re aiming at” (Marketing Manager Starico, edited to ensure comprehensibility).

7. Summary and conclusion

In this paper, we have sought to avoid being caught on the horns of a utopian/dystopian (Knights & Jones, 2007) dilemma in which call center staff are seen, on the one hand, as enjoying the benefits of autonomy and empowerment in creating quality service and special customer relations or on the other, suffering high levels of surveillance and management control. The use of CRM is perhaps closer to the dystopian than the utopian image but it in no way denies ‘the potential, the presence or the importance of resistance’ (Richardson & Howcroft, 2005, p. 77) nor of internal and external contradictions in the use of the technology. As the example of the screen prompt insisting on the CSR offering a loan to a customer with a £10,000 credit balance suggests, CRM can only produce a mimesis, a Shamanistic artifact (Taussig, 1993) representing a typical customer. Notwithstanding the efforts at capturing data on customer’s past behaviour, or present dissatisfactions, the

attempt to colonise the identity of a customer through a computer profile can only produce a data double (Berry & Linoff, 2000) not necessarily an exact copy of the subject. Nonetheless, mimesis is invariably about ‘the power of the copy to influence what it is a copy of’ Taussig (1993, p. 250). Rather than this being concealed within the complexities of magic and ritual or of ‘Primitivist Parody’ (ibid. 10), CRM turns this into a virtue openly declaring that the artefact (i.e. the mimesis of the customer) enables the exercise of power over the subject that the mimetic model seeks to portray.

The digital or statistical artefact (Bogard, 1996) or mimesis (Norris, 1987), is perceived to offer various selling opportunities. These can be a great improvement on simple segmentation strategies that are restricted to delivering services to loose categories of the customer, based on relatively fixed conceptions of class, residence, gender, ethnicity and age. CRM mimetic models have the potential to capture the very subjectivity of individuals so as to deliver products and services that match precisely the demand profile of their target customers. However, as we have shown, CRM often falls well short of this precision and only the CSR agent’s intervention can deflect the sometimes-nonsensical, demands of the CRM system from inflicting irreparable damage that could lead to the company being charged with a technology-induced misselling.

The discourse of consumer sovereignty is equally as much targeted at front line CSR agents as important precursors or signifiers of the corporate image and good customer relations. As long as they believe that the customer is sovereign, they are not only able to take advantage of customer goodwill when things are running smoothly but also, in Goffman’s (1973) phrase to ‘cool the mark out’ and act as a buffer for the company when things go wrong.

Through data mining, the complexity of the consumer is reduced to a manageable set of data that can be used to match up with particular products. While it is claimed that the large databases are managed so as to capture information on customers’ ‘needs’, in many senses the ‘needs’ are constituted by the producers and certainly the product offerings are linked to those that promise high levels of profitability (Noble, Knights, Willmott, & Vurdubakis, 2000; see also endnote xii). The technological/ virtual space in which the encounter takes place means that the customer appears as a mimesis, or simulation based only on very limited information captured by the communicating company. Even if this data is overlaid or enhanced by demographic/geodemographic and lifestyle data, s(h)e is still only an ideal type amongst a disaggregated and re-aggregated community of simulations.

The objective underlying CRM would seem to be that techniques can be applied to the management of data that offer companies the opportunity to come up with formulae that will *enchant* the customer. But the other essential of CRM – service quality – may or may not forge the relationship that seduces the customer into a long-term relationship with the organisation. Managing the customer then, involves an ‘enchanted myth’ of customer sovereignty (Korczyński, 2000). This, however, assumes that the customer is fully present in the relationship. Occasionally or fleetingly, within the service or sales encounter, a full understanding of the customer may emerge. However, as in some of our examples, the mimetic models produced by CRM for purposes of targeting a product or service, may well be off the mark. It is probably, therefore, beneficial to companies that CSRs sometimes make their own judgements as to whether to follow the prompt directing them to promote a targeted product or service. The debate is open as to whether in using their own initiative, CSRs can be seen to exemplify resistance to their being configured as a

principal vehicle for creating and sustaining the company's brand image. An alternative interpretation is to see it as an example of CSRs securing their own self-image and identity in doing their job well – an unintended consequence of which might be to sustain the corporate image or brand. Since the major objective is to provide service quality as well as to increase sales, there are bound to be a number of tensions. Further research on how CRM works in call centers and beyond, not just in theory but also in practice could help to clarify what here remains somewhat speculative.

Following Orlikowski and Iacono (2001), we have sought to examine CRM in terms of its construction as a structure embedded within work practices, and as subject to development and perhaps modification in processes of implementation and use. We have also drawn on Foucault (1991) to suggest how CRM could be seen both to extend and change the broad project of 'governmentality' designed to manage aggregated populations through the capture and manipulation of data. This project also plays on the individualising tendencies of contemporary consumerism by presenting its targets with the illusion of a tailored and personalised service and thereby may be seen as part of what Foucault described as a technology of the self in constituting individuals as subjects that are a suitable case for self management. Even so, the machine-produced individual that is the product of CRM information-gathering techniques can only be a re-aggregated model of the customer-at-a-distance. As we have indicated, these at-a-distance knowledge gathering and evaluation techniques are also applied to the work of call center staff. Where the CSR is concerned, the data collected from remote sources often appears to be a mismatch with the views on the individual held by themselves, but also by team leaders and line managers who are closest to the members of staff. A limitation of the study has been not having the resources to study the impact of CRM on customers directly. There are, of course, numerous surveys carried out by consultants but these are often extremely expensive to access and often do not meet the standards of academic research. We also recognise that consumer surveys are notoriously difficult and expensive to conduct but in any future research we would recommend this development and trust this paper will serve to stimulate such interest.

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