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CRM IN CALL CENTRES
The Logic Of Practice

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Abstract: We are said to be living in a new and global 'knowledge economy' where individuals and organisations are urged to change their way of working, learning and living. Nevertheless there are limitations and contradictions when it comes to managing knowledge, let alone making sense of knowledge management in the context of organisational practice. This paper focuses on research analysing Customer Relationship Management (CRM) systems, their relationship to knowledge management and their use in call centres in the UK. Assuming a critical research approach, case analysis shows significant contradictions between system objectives and outcomes in practice. By referring to the work of Pierre Bourdieu, a sociologist and critical social theorist, Information Systems (IS) researchers are provided with tools of analysis. In this paper I shall show how key concepts of field, habitus, logic of practice and symbolic violence gave fresh insights into the study of CRM systems in call centres.

Keywords: CRM systems, call centres, knowledge management, critical research, field, habitus, logic of practice, symbolic violence.

1 INTRODUCTION

In the process of analysing CRM system use in call centres, this paper stresses the relevance of applying social theory to the theory and practice of IS. Social theory builds our 'intellectual scaffolding' (Walsham, 2001) and by using the conceptual tools provided by the critical social theorist Pierre Bourdieu, this gives us fresh insights into CRM system use in call centres and greater understanding of knowledge management and change. The distinctive issue confronting contemporary business we are told is not the centrality of knowledge but rather the opportunities there are to intensify its

production and utilisation (Castells, 1996). Yet there are many contradictions with IT-driven knowledge management. Some stress the need to see production of knowledge in the context of its use (Gibbons et al., 1994). Others view knowledge management as a whole as 'hype' and 'to suppose that the use of computers can suddenly provide us with the ability to manage something we don't understand is humbug' (Bentley, 1999). What is also often overlooked is that 'power structures play a large part in the making and accepting of knowledge' (Adam and Richardson, 2001) and how technologists so often lack understanding of the situated work practices of the systems user communities (Kvasny and Truex, 2000).

One way organisations try to manage knowledge is through the use of CRM systems. This paper presents an analysis of CRM and knowledge management in organisational practice and the rich social interactions at work. In these terms the critical social theory of Bourdieu provides intellectual foundations useful in this critique of IS and organisational research where individuals are often marginalised (Alvesson and Deetz, 2000). Bourdieu shows appreciation of the dialectical relationship between the individual and the world they inhabit. He discusses the unity and regularity of systems and their practical coherence but on the other hand their 'fuzziness' and irregularities both being equally necessary and inscribed into what he terms the logic of practice (Bourdieu, 1990). This is important when looking at CRM system use embedded as it is in notions of transformation – of organisations in a global knowledge economy, of new ways of working, of virtuality central to communication amongst 'stakeholders'.

The paper shall proceed by firstly justifying the critical approach to organisational research. I shall then introduce the problem areas of CRM, its links with knowledge management and CRM use in call centres. I then briefly discuss the key concepts of field, habitus, logic of practice and symbolic violence and their roles in the 'circuit of reproduction' (Bourdieu, 1990). These concepts are applied to the case material resulting from what I have described as a mobile and interpretative field study. In conclusion I stress the important contribution Bourdieu and critical research has made to the study of organisational practice in the context of the 'so-called' knowledge economy.

2   RESEARCH OBJECTIVES

The objective of this research is to introduce a critical theory perspective to IS research specifically drawing on the conceptual tools provided by Pierre Bourdieu. Bourdieu was a 'resister' appearing on various anti-

globalisation platforms before his death in 2002. He also challenged the orthodoxy and what is legitimate or not in terms of research and research findings. In this context, this study attempts to give a wider political picture and to question the assumptions that perhaps just focus on the efficaciousness of software or the constraints or otherwise of IS.

The process of conducting critical research means disrupting ongoing social reality in order to question what is often ignored or taken for granted and gain a critical and richer insight into issues raised. It has been noted that social research – particularly management studies – has tended to conform or reproduce dominating institutions and interests (Alvesson and Deetz, 2000). This paper in contrast aims to throw the spotlight on the individuals' working on the call centre 'front line' and tell the stories often left untold in studies of IS and change (Bannister, 2002; Alvesson and Deetz, 2000). Call centre organisations are seen as 'social and historical creations' and the critical research approach aims to 'recognise the influence of history, culture and social positions on beliefs and actions' (Alvesson and Deetz, 2000). Such is the foundation of Bourdieu's critical social theory too. Taking this approach demands critical reflection, imagination, commitment and application of what has been termed a reflexive methodology - an 'interpretive, open, language sensitive, identity conscious, historical, political, local, non-authoritative and textually aware understanding of social research' (Alvesson and Skõlberg, 1999).

What critical research and Bourdieu's analysis in particular shows us, is that there are wider institutional and ideological issues to be discussed when studying IS and organisational change (Alvesson and Deetz, 2000; Bourdieu, 1990). Furthermore this paper follows the established traditions of conceptualising the social and political as well as technical issues of IS in organisational practice (for example see Franz and Robey, 1984 and Markus, 1983).

3 CRM AND KNOWLEDGE MANAGEMENT IN CALL CENTRES

CRM system use in call centres is about strategic knowledge management utilising tools and applications to enhance the accessibility of knowledge, to automate and manage knowledge and organisational intelligence. CRM systems attempts to codify knowledge and so control customer and other relationships.

The case material in this paper focuses on CRM system use in telephone call centres in the UK. They operate to handle the 'frontline' communication with customers, control and to various degrees automate the gate-keeping

roles, capture and standardise sales knowledge and oversee customer service. This front line work is vital and significant to an organisation. It is often strategically important work. CRM system use is aimed at streamlining and shortening the key business processes that define a global organisation's relationship to the markets and customers – it is a strategic business issue that requires technology support (Ciborra, 2000). A number of IT tools can be utilised including automated call distribution (ACD) systems using computer telephony integration, voice and speech recognition and response software, integrated volume response and use of the World Wide Web.

CRM systems mean codifying intellectual capital (Light, 2001) with software providing 'scripts' enabling monitoring and call analysis. This metaphorically, if not physically, welds the worker and machine into a streamlined and controlled knowledge system. Architects of CRM systems, for example, want to 'predict the future world of the user and the machine' but Wilson and Howcroft (2000) stress the important focus of contradiction and resistance, always apparent and possible with human-computer system interaction in an organisational context. This is central to Bourdieu's view of the logic of practice also. Although CRM system use in call centres aims to formalise, standardise and rationalise responses with the use of scripts, nevertheless there is also resistance from non-compliant users actively or otherwise failing to act out the 'script'.

Contradictions appear in work practices too. CRM system use in call centres goes hand in hand with the adoption of teamwork and empowerment management methods. However it is clear from this study and others that team-based management is there to control workers in an organisation rather than to empower them or liberate them from control (Truex and Ngwenyama, 1998; Richardson and Richardson, 2002). Recognising potential contradictions of course 'enables understanding of points of conflict and instability in organisations and how these may interact to change and transform organisations' (Orlikowski, 2001).

There are startling contrasts in the image of CRM in call centres. For the consultants and employers, CRM use in call centres means knowledge intensive, strategic use of technology, flexible working and utility of all those new ways of working like flattened organisations, teamwork and empowerment. For others, they are the 'sweatshops of the 21st century' (Belt et al., 2000).

4   CONTRIBUTION OF BOURDIEU

In this section I will discuss the key concepts of field, habitus, logic of practice and symbolic violence in the critical social theory of Pierre Bourdieu in order to show how these concepts are relevant to IS research.

4.1   The Generation of Practice

Bourdieu tries to convey that the social space and the individuals that occupy it are a result of historical struggles; individuals produce the social space they live in and they are in turn produced by it. Therefore they both incorporate and objectify social structures that they inhabit (Wolfreys, 2000). The relationship between the individual and society, or structures and agencies, is expressed in an analogy: compare social activity to an individual sense of play - people are free to act but they can only do so within the constraints of the game that they are playing. The game or social activity allows for improvisation and manipulation of rules and coming to terms with the game is called the logic of practice. The logic of practice involves not just coming to terms with the rules, nor is it a wholly unconscious experience, nor is it purely as a result of rational calculation. It is that people develop strategies of behaviour but these are shaped by their objective situation (Wolfreys, 2000). In a game a field is clearly seen for what it is – 'an arbitrary social construct underlined by everything that maintains its autonomy – explicit rules, delimited time and space and playing involves a quasi-contract' e.g. for 'fair play'. Social fields on the other hand are the products of a long, slow process of absorption and development of unconscious autonomy and are games 'in themselves' not 'for themselves' (Bourdieu, 1990). Multiple fields define the objectified social structures that identify a society. An actor does not consciously embark on the game – they are born into it and actors need habitus to make it work.

Habitus is a system of generative schemes that are durable – inscribed in the social construction of the self and transposable – from one field to another. So Bourdieu can analyse agents as objectively co-ordinated without being the product of rules on the one hand or conscious rationality on the other (Calhoun et al., 1993). The feel for the social game becomes an instinctive part of the make up of individuals via the habitus that becomes a way of behaving based on a sense of what might be achieved (Wolfreys, 2000).

In what Bourdieu describes as the dominant circular path – a causal loop of generation and reproduction, actors internalise the structure of the field as habitus. Habitus in turn generates practice and practices serve to reproduce the structure of the field. Practices are the recognisable patterned actions in

which both individuals and groups engage. They are not a mechanical reaction to rules, norms, models but a strategic yet regulated improvisation responding to a dialectical relationship between a specific situation in a field and habitus (Bourdieu, 1973). Practices are generated by dynamically combining past experience, present situation and implicit anticipation of the future consequences of these very actions. Being determined partly by past conditions through habitus, they tend to reproduce the regularities and objective structures of which they are both products. Through the circuit of reproduction the objective relations of the field are produced and reproduced to both reinforce and change the field's objective structure such as class distinctions and schemes of classification (Kvasny and Truex, 2000). Figure 1 serves as an illustration of these points:
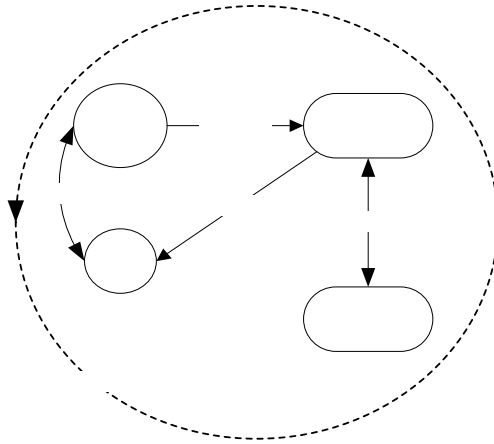

Figure 1: Generation of Practice

Also there is the question of how power relations exist and are maintained alongside the habitus. Domination is maintained in society by means other than direct repression. Society, as stated, is made up of different fields e.g. fields of education, politics, and economics and so on. Within each field people compete for 'capital'. This could, for example, be cultural capital or monetary capital – any capital that is at stake within that particular field. Different forms of capital can be converted to other forms. Once the credentials of this capital becomes generally acknowledged and legitimised then power relations no longer exist between individuals but become objective mechanisms and social institutions that reproduce relations of domination without the need of direct intervention by the dominant group in society (Wolfreys, 2000). The term symbolic violence is coined, being a legitimate call for deference to authority.

Schultze and Boland (2000) have noted three functions of symbolic violence in Bourdieu's analysis - knowledge integration, communication and political domination. Formal controls for example drive behaviours and outcomes through bureaucratic measures. This relates to the knowledge integration function of symbolic violence where written policies, procedures and methodologies are employed to provide a universal ordering and understanding in the social arena (Kvasny and Truex, 2000). Informal control on the other hand involves norms or self-regulation within social classes, for example. This corresponds to communication because controls are embedded deep within codes and shared class meanings. They result from the collective habitus of actors within a social group. The political function means that indirect cultural mechanisms rather than direct coercive social control provide order and social restraint. Symbolic violence is most powerful when it hides the interested nature of managerial actions and when acceptance of an IS by the users serves to perpetuate their domination (Kvasny and Truex, 2000).

5 CASE STUDY

The case material describes call centres in the NW of England. Ironically these are often housed in the old mills and engineering shops once foremost in the industrial revolution but long since idle. That is until the 'virtual' age and it is interesting to consider whether this is indeed the new economic era, or history repeating itself. The area of study has the largest number of call centre jobs in the UK (TUC, 2001). There are many types of call centres including new technology companies with public service centres using 'help desks'; business to business intranets; outsourced services and portal models that rely on attracting maximum users to a web site to drive advertising, negotiate bulk purchasing deals or charge 3rd parties to access customers.

5.1 Mobile Field Study

Rather than taking an organisational or case study model representing examples from each call centre type, this research instead aimed to follow the fortunes of call centre workers as an interpretative and what is described as a mobile field study. In these terms, four call centre workers were involved with the researchers in a two-year study. As the four changed workplaces for a variety of reasons so this enabled aspects of CRM system use in nine different call centres to be analysed (Richardson and Richardson, 2002). In these terms the researchers were mobile, moving as 'shadows'

rather than fixing themselves in the organisations and taking snap-shot views.

In practice, we all met up regularly, sometimes engaged in-group discussions, sometimes in one-to-one interviews. Consent was sought for the content and direction of the research not just at the outset but as an on-going concern. Participants supported the research and wanted their voices to be heard and stories told. The powerful tales are of stress, burn out, sacking, job changes and frustration but also of community, solidarity and collective action. Interviews were transcribed and reflexive stories written but always shown and discussed with the individuals concerned.

Call centre work is characterised by temporary, short-term contracts, agency working and casual employment in the UK. The North-West call centre labour force has a large proportion of gay and lesbian workers, women and students reflecting the City Centre locations, low pay and reliance on a bulk of temporary transient staff. Readers may be concerned that a degree of personal detail has been included. However these personal profiles are essential to understand the contribution of culture and history – habitus – to the study of the social relations of IS use. This is one of the strengths of using the conceptual tools of analysis provided by Pierre Bourdieu. Taking a critical research approach means not restricting study to a one-dimensional view of 'the organisation' or 'stakeholders'. Rather the contribution of Bourdieu enables holistic reflection.

The profiles of the interviewees are as follows - names have been changed for reasons of anonymity:

Angela: A woman in her 50's Angela has been working in call centres for nearly 10 years. Most of this has been for a telecommunications organisation in her hometown. She became an example of a highly valued agent, with intensive knowledge of the area and customers (Frenkel et al., 1999) and could give a highly personalised and rich service. Redundancy followed as the organisation transferred to a large, impersonal and centralised service utilising CRM systems to the full. She was alarmed at the change in working conditions finding teamwork and supervision intimidating and the work pressurised and impersonal.

Bill: A young gay man and a dreamer longing for travel and then going back to college. Bill works from call centre agencies but is intolerant of bullying and intimidation from management. If he doesn't like the work or atmosphere, he walks down the road to the next call centre.

Colin: A male supervisor in his 30's in a difficult role at work at one supporting the staff against the more extreme acts of discipline and

control and yet under pressure to carry out higher management instructions regarding teamwork, productivity and sanctions.

Denise: A part-time worker and lesbian woman in her early 30's, Denise at the time of the research was also a student on a Business IT postgraduate diploma. She was angered by the 'management claptrap' on the course she studied – high on IT for competitive advantage and low on the consequences for call centre staff.

5.2 Bourdieu and the Logic of Practice in Call Centres

In this section examples from the case material are applied. These are presented under the headings of field, habitus, logic of practice and symbolic violence but as Figure 1 has shown in reality these aspects are strongly interlinked.

5.2.1 Field

Many fields spring to mind when considering the logic of practice in this case study. However the field in focus here is that of CRM use for knowledge management in UK telephone call centres. It is a field fraught with contradictions. Problem areas of CRM system use lie in the limitations of software that assumes business processes are in place. With CRM implementation operational efficiency is also often mistaken for competitiveness and the competing interests of different groups is not recognised or is neglected (Light, 2001).

In the workplaces we studied labour turnover was high. In one centre labour turnover was expected to be 100% in their first year. Scripts and monitoring aspects of CRM software were utilised. Practices like 'hot-desking'[1] were imposed to de-personalise work stations. Workers were generally organised in teams with a team supervisor receiving very little enhanced pay, put there to disseminate orders from the top down.

Management tried various techniques to try to establish control of teams, enhance productivity and instil peer pressure on 'the weakest link'[2]. These included incentives like awarding of food vouchers for improved sales

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[1] This is the practice whereby workers are not allocated their own work station or work space but sit at the nearest available desk. Individualisation of work space is not permitted.

[2] During team meetings, supervisors encourage analysis of the team performance and identification of individuals who appear to be the weakest link in terms of productivity and so on. Teams were encouraged to assert peer pressure on the individuals identified in order to improve team performance.

figures to the use of punitive actions like imposing star charts to encourage behaviour modification – a technique I have failed to use effectively on many occasions when my children were toddlers!

5.2.2 Habitus

The habitus of our call centre interviewees reflected these aspects of the field. Often in teamwork sessions however orders were side-stepped or ridiculed and had to be dropped. Hot-desking for example failed miserably. Unwritten rules were kept almost unconsciously about who sat where and call centre staff persisted in individualising their work stations with toys and pictures. Yet at the same time the monitoring aspects of CRM system use means that no aspect of the call centre workers day was unaccounted for. They were profiled, listened in to, their opening remarks analysed and wrap-up time and phrases used. The sales content of their conversations, achievement of call numbers and sales targets were scrutinised. Call times were strictly monitored with pressure on for quick 'closure'. Their off-line frequency, intimate toilet habits were considered and discussed at teamwork supervision sessions as were perceived attitudes displayed during conversations with customers. Such is the reality of new ways of working expressed in teamwork and empowerment. As Bill said one day:

"You can't be early, can't be late, can't go for a sh*t"

Call centre work can be very stressful and alienating. Calls stream in with always another one waiting. Many workers suffer 'burn-out' and stress driven by the ACD systems, lack of control, remote listening, abusive customers and low pay. Sometimes symptoms would be the inability to stop crying, yet such is the completeness of the CRM system monitoring and control that statistics would be kept of this too. Denise laughed when she remembered:

"There was even a code for running to the restroom to cry"

The habitus of the call centre worker also means coming to terms with uncertain and casual employment. Bourdieu has commented that a feature of work today is generalised and permanent conditions of insecurity and how a constant threat of unemployment, for example, shapes a new type of domination aimed at compelling workers to submission and acceptance of exploitation such as is experienced in call centre teams (Bourdieu, 1999).

Despite facing frequent and sustained verbal abuse from customers call centre staff had to control their responses. This has been described as an aspect of 'emotional labour' where employees have to publicly display an emotion not necessarily felt (Hochschild, 1983). As Denise said:

"I hated being happy, happy all the time – the voice with a smile"

Our interviewees though did enjoy the opportunities for rich communication and dealing with complex issues presented by the customers. Here is when scripts were often bypassed and ignored. Often advice about debt and so on was given beyond that stipulated by the script.

The habitus of the call centre worker is also a story of solidarity and community. Someone was burgled and a collection held to help replace items. Cakes were baked for birthdays. Non-verbal communication was used if a customer became abusive. Then others would listen in and be able to provide comfort after the ordeal. If someone was 'strapped for cash' then their food vouchers won as bonuses were exchanged for money. At one time Bill won £400 worth of vouchers in a national sales competition, although he admitted that this had been achieved by adding items to customer bills and waiting for complaints later! By exchanging these for cash he managed to buy a plane ticket to Jamaica.

Management methods often intimidated, yet solidarity helped in many cases. During the study there was a major official strike against bullying in one of the call centre organisations. This precipitated the Trades Union Congress and call centre organisations to consider good practice (TUC, 2001).

5.2.3 Logic of practice

The importance of the logic of practice as a tool of analysis, as identified earlier, is how lessons can be learned from the past, present and future anticipation of outcomes. Specifically in this case study the logic of practice is the manifestation of the contradictions in the intentions and outcomes of CRM system use in practice.

The logic of practice from CRM system gurus is a story where 'CRM systems provide competitive advantage', 'knowledge can be managed and codified for strategic benefit', 'team work empowers', 'hot-desking will eliminate the garbage of individualisation', 'standardising responses through scripts is effective communication' and 'customer service is an unskilled job, therefore high labour turnover is acceptable, and will not build up future problems'. This study has uncovered a different story. CRM systems are

exploitative and work against communication richness; they increase bureaucracy and control rather than embracing empowerment.

CRM and knowledge management needs co-operative skills but of course this development can backfire with a challenging of employers control over the means of production. Knowledge is about experience and as such history is important not just for defining the knowledge held by individuals or organisations but also for understanding the impacts that new IS and change will have – lessons that can be learnt from history. Here is where the habitus comes in 'the habitus, a product of history provides individual and collective practices – more history – in accordance with schemes generated by history' (Bourdieu, 1990). Those who make knowledge a passive recording forget that 'all knowledge is an act of construction and agents far from reacting mechanically to mechanical stimulations, respond to the invitations or threats of a world whose meaning they have helped to produce' (Bourdieu, 1990).

In these terms Bourdieu offers tools of analysis that go beyond the IS constrains or liberates debate and enables a richer understanding and identification of the many organisational and other issues that have intended or unintended consequences.

5.2.4 Symbolic violence

The mode of domination involves the practice of teamwork to exert peer pressure as well as senior management pressure via the team supervisor on the perceived 'weakest link'. Uncertainty and stress leads to an expectation that the job will be short-lived. This habitus results in putting up with the job, responding to supervision or walking down the road to the next call centre rather than resistance. However more crude acts of management oppression spills over into small disputes or even strikes at times. Taking the framework of understanding symbolic violence in organisations outlined earlier by Shultze and Boland (2000) this case study can be analysed as follows:

Knowledge integration aspects involve the use of scripts, rules, codes that even result in codifying responses to stress and also the way team working is used to self-regulate. CRM requires that exact phraseology is imposed for monitoring and analysis purposes. Angela explained that calls were dissected into 4 parts: #1 a welcome and introduction; #2 offering products and services; #3 recap call; #4 positive close. Angela faced difficulties with management for failing to use the exact words "and to recap". Supervisors made her put labels on her monitor with the words on and she had to tick a 'star chart' when she used the words. Her calls were monitored closely and listened in to. Saturdays were colloquially called the

'sacking day'. It was easier and less obvious for management to dismiss someone on a Saturday. One Saturday, Angela was sacked for again using words similar to, but not actually "and to recap".

Communication aspects reveal themselves in the contradictions between the solidarity and community generated by the call centre worker habitus but also the fragile and uncertain nature of the work.

In terms of political domination, management practices were not well concealed. This can be linked to a crude application of CRM software and also a feeling that endless numbers of replacement workers were available. Issues like customer revolts against scripting and automated customer service and a realisation that 100% labour turnover per year is not feasible or profitable may well have impacts on this aspect of domination in the not too distant future.

6 CONCLUSIONS

In this paper I have introduced the critical IS research perspective, specifically drawing on the conceptual tools of analysis of Pierre Bourdieu. In these terms I am following in the footsteps of Schultze and Boland (2000) who applied Bourdieu's key concepts to their study of 'information gatekeepers' and also that of Kvasny and Truex (2000) who established a research agenda using the work of Pierre Bourdieu.

Critical theory has often been criticised for being too theoretical and esoteric (Boudreau, 1997). Moreover critical social theory has had limited exposure in IS research and therefore there is a lack of field experience. This interpretive study examining the social relations of CRM system use in telephone call centres in the UK hopes to make a small contribution to addressing this criticism.

The contribution of Pierre Bourdieu to this study has to be seen in the context of knowledge management in organisational practice. Bourdieu helps us understand the complex historical and cultural factors involved in the social relations of IS use. This comes specifically through analysis of the competing fields, understanding of the role of habitus, contradictions apparent through the application of symbolic violence as a mode of domination and how the relationships between structures and agencies involved manifest themselves in the logic of practice.

Critical social theory suggests that people can change their world (Boudreau, 1997) – there is nothing inevitable about what technology we have and how it is used. Moreover critical social theorists seek to emancipate people and are concerned to find alternatives to existing social conditions as well as challenging taken-for-granted conditions (Alvesson and

Deetz, 2000). In these terms a clear motivation for this research has been to highlight the contradictions between CRM rhetoric and the reality for call centre workers on the 'frontline'. It aims to let their stories be heard.

There are obvious limitations to such a small study in a particular area of the North-West of the UK. CRM use across the organisations concerned would have given further insights. Call centre work is increasingly being outsourced and a particular favourite is setting up centres in developing countries. The dynamics of this social reality would provide a further dimension to this research. As intellectual scaffolding however it is clear that Pierre Bourdieu has provided IS researchers with powerful tools of analysis.

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