The warm and fuzzy lyrics of “Getting to Know You” sung by Deborah Kerr in the 1950s was meant to inspire the notion of “feeling free and easy” as a schoolteacher became more acquainted with her young charges. Today, getting to know you is the hallmark of customer relationship management (CRM). And while the goal is to know you enough to make you feel “free and easy,” as the song says, CRM becomes complicated as it takes on competing consumer desires.

Debating the term “CRM” succinctly helps Jeff Tanner, associate dean of Research and Faculty Development and professor of Marketing, often uses the words of Paul Greenberg, author of CRM at the Speed of Light: to dissect the meaning. The author calls it “…a philosophy and a business strategy, supported by a technology platform, designed to engage the customer in a collaborative conversation in order to provide mutually beneficial values.”

To this Greenberg adds “…it’s the company’s programmatic response to the customer’s ownership of the conversation.” Complications arise when people forget those last few words that emphasize CRM is a “conversation” that the customer owns.

“CRM is how we treat the customer what we offer the customer, how we talk with the customer, how we create systems to improve our interactions with the customer,” Tanner said.

And since CRM requires interaction to work, the businessperson must understand who the customer is, what he wants, and how the business can fulfill his desires. Merchants do this by watching shopping behavior on websites. They see what customers look at and for how long, as well as the order in which they shop. Content analysis occurs on blogs, tweets and Facebook posts.

While critics might call this an invasion of privacy, CRM experts maintain that businesses can collect and store customer information ethically if they are being transparent and honest. Tanner noted customers also benefit when the merchant has the ability to predict what they want and need and gives it to them.

For example, Tanner works with outdoor store Cabala’s, which collects data from a variety of sources. The store combines the information in a model so that Cabala’s can predict what the customer wants next. Such prediction means the merchant is not sending camping information to customers who have never shown interest in camping. The customer gets information that is both relevant and timely, and the company benefits when it sees higher response rates to its offers.

Safeguarding customer information requires not only a plan but also a place—a service provided by companies like Teradata. The data and enterprise analytics company offers a warehouse for customer information, and treating information ethically is just good business, Shirley Hunter said. Hunter is a Baylor graduate, has worked for Teradata 30 years and is vice president in charge of Teradatad’s Copqgemi Global Partnership.

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“At Baylor, I talk about ownership of customer data and the rights that customers grant you implicitly and explicitly,” Tanner said. “This is not only a CRM issue. If you have a customer who competes with another customer, how much can you divulge? This comes up in sales, CRM and marketing research classes. It comes up throughout the marketing curriculum on a pretty regular basis.”

Also, giving the consumer the option of saying “no” has to be part of the conversation.

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