



RESEARCH ARTICLE

THE EFFECT OF IMPLEMENTING CUSTOMER RELATIONSHIP MANAGEMENT, PIPELINE, AND CAMPAIGN ON COMPANY OPERATIONS

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Abstract

This study aims to analyze the effect of Customer Relationship Management (CRM), Pipeline, and Campaign implementation on Company Operations. The rapid development of technology and increasing business competition require companies to manage customer relationships, workflow processes, and campaign activities effectively in order to improve operational performance. This research employs a quantitative approach using a survey method. Data were collected through questionnaires distributed to employees directly involved in CRM, pipeline, and campaign activities. The sampling technique was determined using the Slovin formula based on the research population. Data analysis was conducted using Structural Equation Modeling based on Partial Least Square (SEM-PLS). The results indicate that Campaign and Pipeline have a positive and significant effect on Company Operations, while CRM does not have a significant direct effect on Company Operations. These findings suggest that operational effectiveness is more strongly influenced by the successful execution of campaigns and systematic workflow management than by CRM implementation, which has not yet been optimally integrated into operational processes. This study provides managerial implications, emphasizing the importance of strengthening data-driven campaign strategies, optimizing pipeline management, and enhancing CRM integration into operational processes to achieve sustainable operational performance improvement.

Keyword: Customer Relationship Management, Pipeline, Campaign, Company Operations, SEM-PLS. 3 - 5 keywords

Introduction

The insurance industry is one of the financial service sectors with a high level of complexity because it involves risk management, policy administration, customer data management, claim processing, and ongoing marketing activities. According to Slack et al. (2020), operational quality determines a company's ability to provide consistent, fast, and accurate services, which in turn affects the company's competitiveness in the financial services market.

PT Asuransi Jasaraharja Putera (JRP Insurance) is a national insurance company that continues to drive innovation in services and business process digitalization. However, the company's operational achievements still face various obstacles, particularly in the aspects of customer data management, marketing and sales process integration, and marketing campaign effectiveness.

According to Buttle & Maklan (2019) in their research, the lack of integration of the Customer Relationship Management (CRM) system can cause fragmentation of customer information, which results in slow service, high operational costs, and decreased customer loyalty.

According to Payne and Frow (2017), CRM is "a strategic approach that is concerned with creating improved shareholder value through the development of appropriate relationships with key customers and customer segments." In a more operational context, Kotler and Keller (2016) state that CRM is "the process of carefully managing detailed information about individual customers and all customer 'touch points' to maximize customer loyalty."

The implementation of CRM has not been fully integrated across all branches. Company reports show that customer data management is still carried out partially and is not connected to front office and back office processes in real time. This condition hinders the company in personalizing services and reduces the

effectiveness of delivering value to customers.

In addition to CRM, the marketing and sales pipeline is also a source of problems. A pipeline is a systematic framework for monitoring and managing sales prospects through specific stages until they become actual customers (Heizer & Render, 2017). In the context of marketing management, pipelines help companies visualize sales opportunities, measure the effectiveness of sales teams, and predict future sales performance.

A pipeline, or more commonly known as a sales pipeline, is a sales management concept that describes the flow or stages of the process of converting prospects into customers. A pipeline visualizes the journey of a potential customer (lead) from the initial introduction stage to the purchase or agreed contract.

According to Buttle (2009), a sales pipeline is a systematic representation of the sales process that allows companies to monitor, manage, and optimize every sales opportunity at various stages of the sales cycle. A pipeline functions not only as a sales control tool but also as a means of measuring the effectiveness of marketing strategies and sales team performance.

Meanwhile, Jobber and Lancaster (2015) define a pipeline as a structured approach to managing sales activities that covers all stages from prospecting, identifying needs, delivering proposals, negotiating, to closing transactions.

JRP Insurance still uses a conventional pipeline that runs linearly and is not supported by an integrated digital system. The process of prospecting, qualifying, offering, and closing transactions is not systematically documented, making it difficult for the company to predict sales and optimize the performance of the marketing team. According to Heizer & Render (2017), an unstructured pipeline can increase sales uncertainty and disrupt operational decision-making.

Another problem arises from the effectiveness of marketing campaigns, particularly digital promotions. A campaign is a series of planned marketing communications designed to build awareness, influence attitudes, and encourage consumer action toward a product or service (Kotler & Armstrong, 2018). Campaigns serve as a means for companies to convey their value propositions to customers in a structured manner.

According to Payne & Frow (2013), campaign management is a systematic process for managing interactions with customers through coordinated campaigns to achieve strategic company

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objectives, such as increased sales, brand awareness, and customer loyalty.

Meanwhile, Stone & Woodcock (2014) define it as a mechanism that enables organizations to identify customer segments, select appropriate messages, choose the best communication channels, and measure the effectiveness of campaign results.

According to Chaffey & Ellis-Chadwick (2019) and Kotler & Keller (2016), effective campaign management encompasses five key dimensions, namely Campaign Planning, Campaign Implementation, Media and Channel Management, Monitoring & Evaluation, and Optimization and Learning. The following is a detailed description.

A report by Business 1 Group (2025) shows that some of JRP's marketing campaigns have not achieved their conversion targets. In addition, the campaigns carried out are not always connected to the readiness of the operational units, resulting in a mismatch between the demand generated by the campaign and the company's ability to follow up on that demand. Kotler & Armstrong (2018) emphasize that campaigns that are not integrated with operations can result in a mismatch between marketing communications and service processes, thereby reducing customer satisfaction.

Based on these conditions, there are factual problems that indicate that the company's operations (Y) are still not optimal. A number of previous studies have shown that the implementation of CRM, pipeline, and campaigns has a significant relationship with the operational efficiency of service companies (Mulyadi, 2020; Nugroho, 2021; Prasetyo, 2022). However, in the context of JRP Insurance, there has been no empirical study that simultaneously tests the influence of these three variables on company operations.

Method

The company studied by the researcher is an insurance company named PT Asuransi Jasaraharja Putera, which was established in 1993 and currently has 1 head office, 25 branch offices, and 59 service units spread across Indonesia, managed by 4 directors, including the President Director, Technical Director, Marketing Director, and Finance, General Affairs & Human Resources Director. The research focuses on the implementation of Customer Relationship Management (CRM), Pipeline, and Campaign and how these three aspects affect Company Operations, including process efficiency, service quality, response speed, and flexibility.

This research uses a quantitative approach with descriptive and verificative research types. The research method used is the survey research method. In this study, the researcher uses two types of data, namely primary data and secondary data. Primary data was obtained directly from respondents through the distribution of questionnaires, while secondary data was obtained through company documents, performance reports, and related scientific literature. All indicators in this research questionnaire were measured using the Likert Scale. The analysis of the relationship between latent constructs was carried out using the Structural Equation Modeling (SEM) method based on Partial Least Squares (PLS-SEM), as it is suitable for testing research models with latent variables measured through indicators using a Likert scale and has a fairly high level of construct complexity (Hair et al., 2021).

Multiple linear regression analysis was used to determine the simultaneous and partial effects of the implementation of Customer Relationship Management (X_1), Pipeline (X_2), and Campaign (X_3) on Company Operations (Y). The variables studied in this research were Customer Relationship Management (X_1), Pipeline (X_2), Campaign (X_3) as Independent Variables and Company Operations (Y) as the Dependent Variable.

In this study, the population consists of all employees of PT Asuransi Jasaraharja Putera who are involved in operational, marketing, sales, and customer service activities at the Branch Office, with a total population of 198 employees. This study uses the probability sampling method with the simple random sampling technique with a total sample of 132 employees.

Results and Discussion

Table 1.1 Research Data

	Original sample (O)	Sample mean (M)	Standard deviation (STDEV)	T statistics (O/STDEV)	P values
Campaign -> Operasional Perusahaan	0.465	0.467	0.120	3.874	0.000
CRM -> Operasional Perusahaan	0.039	0.046	0.084	0.461	0.645
Pipeline -> Operasional Perusahaan	0.444	0.436	0.136	3.268	0.001

The results of path analysis using PLS-SEM show that there are two significant relationships and one insignificant relationship with the Company Operations variable. First, the relationship between Campaign and Company Operations produced a path coefficient value of 0.465 with a t-statistic value of 3.874 and a p-value of 0.000. This value indicates that the effect of the campaign on company operations is positive and significant at a significance level of 0.05. This means that the more effective the company's campaign activities are, the better the performance of Company Operations will be. Thus, the hypothesis is accepted.

Conversely, the relationship between CRM and Company Operations shows insignificant results. The path coefficient value is only 0.039 with a t-statistic of 0.461, which is far below the minimum limit of 1.96, and a p-value of 0.645, which is well above the threshold of 0.05. This indicates that CRM does not have a meaningful direct effect on company operations. Thus, the hypothesis cannot be accepted.

Furthermore, the relationship between Pipeline and Company Operations shows a positive and significant influence. The path coefficient of 0.444 with a t-statistic of 3.268 and a p-value of 0.001 indicates that Pipeline contributes significantly to improving the company's operational performance. This finding indicates that the better the Pipeline process within the company (e.g., workflow, reporting system, or sales process), the better the operational effectiveness. Thus, the hypothesis is accepted.

Discussion

Based on the results of the hypothesis testing discussion, this study emphasizes the integrative role of Campaign and Pipeline in improving Company Operations, while CRM acts as a supporting factor that requires further optimization. These findings provide empirical evidence showing that operational success is not only determined by the CRM system, but is more influenced by how campaigns and pipelines are managed in a systematic and integrated manner.

Overall, the discussion shows that:

1. The research instruments are proven to be valid and reliable, making them suitable for use.
2. Campaign and Pipeline are proven to contribute significantly to Company Operations, so companies need to strengthen both aspects in their business strategies.
3. CRM does not have a significant direct effect, so further evaluation of CRM implementation is needed to ensure that the process is integrated with company operations.

Limitation Of The Study

This study has several limitations that should be considered when interpreting the findings. First, the research employed a quantitative survey approach with a cross-sectional design, in which data were collected through self-reported questionnaires; therefore, the results only reflect respondents' perceptions at a single point in time and do not capture the dynamic changes in the implementation of Customer Relationship Management (CRM), Pipeline, and Campaign on company operations over time. Second, the study was conducted in a single organization, namely PT Asuransi Jasaraharja Putera, which limits the generalizability of the findings to other insurance companies or different industry sectors. Third, the sample was limited to employees at the branch office level, and thus perspectives from top management and other organizational units may not be fully represented. Fourth, this study examined only three

independent variables, whereas company operations may also be influenced by other factors not included in the model. In addition, the use of SEM-PLS primarily focuses on testing relationships among variables rather than providing an in-depth explanation of the underlying causal mechanisms, particularly regarding the insignificant effect of CRM on company operations.

Conclusions and Recommendations

Based on the results of research and data analysis using PLS-SEM, discussion, and hypothesis testing, regarding the discussion of the Influence of Customer Relationship Management, Pipeline, and Campaign on Company Operations, the following conclusions can be drawn:

1. The results of the study indicate that the implementation of Customer Relationship Management (CRM) does not have a significant effect on the operations of PT Asuransi Jasaraharja Putera. This finding indicates that although CRM has been implemented, its utilization has not been fully integrated into the company's operational processes. Several CRM indicators show relatively lower values compared to other variables, particularly in terms of the utilization of customer data for operational decision-making and cross-unit coordination. This means that CRM has not been able to contribute directly to improving the company's operational effectiveness.
2. The test results show that the pipeline has a positive and significant effect on the operations of PT Asuransi Jasaraharja Putera. This finding indicates that clear, systematic, and measurable workflow management can improve the efficiency and smoothness of operational processes.
3. The results show that campaigns have a positive and significant effect on the operations of PT Asuransi Jasaraharja Putera, and are the most dominant variable. This indicates that effective campaign planning and implementation can drive an increase in the company's operational activities.
4. Simultaneously, the implementation of CRM, pipeline, and campaigns affects the operations of PT Asuransi Jasaraharja Putera. These results indicate that the combination of these three variables can explain the company's operational variations with an adequate level of explanatory power.

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