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Services Marketing Development: Employees Service Orientation and Service Quality in the Telecommunication Sector

Marketing strategies play central role in achieving competitive superior values mostly in customer's perceptions and minds. Over the course of the development of the industry, in the transition from a period of rapid growth to more moderate growth, expressed in a slowing of the rate of technological innovation and applications, the results of business activity and loss of market segment indicate a transition to a stage of sector maturation. The current report is based on comprehensive research of telecommunication sector. The authors investigated the proposed model in two modes: 1) single service provider to multiple business cus-tomers (B2B) relationships, and 2) multiple service providers , copper lines infrastructure company and cable infrastructure company to consumers (B2C) relationships.

Key words:
Marketing Development,
Marketing Concept, Service,
Service orientation, Quality,
Quality of service,
Telecommunication sector

INTRODUCTION

Marketing strategies play central role in achieving competitive superior values mostly in customer's perceptions and minds. Today, as a part of the marketing management philosophy, *marketing concept* suggests that "achieving organizational goals depends on determining the needs and wants of target markets and delivering the desired satisfactions more efficiently than competitors do" (Kotler et al., 1999, p.19). Providing customer value and earning the customer's trust could be achieved by providing superior service quality. Customer value and the relationship with the customer are the core of the marketing concept (Nijssen & Frambach, 2001).

Until the 1980s, telecommunication companies in most industrialized market economies were fixed line public sector utilities enjoying 'monopolies' in their home market. However, many telecommunication industries exposed to competition. These processes induced to compete these former monopolies to change their corporate culture towards a better commercial performance. In the early to mid 1990s, many Central and East Europe countries made a successful shift to a free market style economic system and were cited as being the most likely of the European transition economies (ETEs) and that employment relations would play a key role in this successful transition (Ross, 2008).

The telecommunications sector in Israel is one of the most dynamic sectors of the economy, and with no doubt the most dynamic of the public utilities sectors in Israel like in many other countries. (1. table)

This dynamism has been supported by a constant flow of technological improvements, and it is reflected in the pace of implementation of these improvements, in the variety of services the sector offers, and in the changes in the public's demand for services. (2. table)

This moderate dynamism is surprising considering the monopolistic origin of the sector and the government control of the sector until recently. The dramatic changes that occurred in the sector would not have been possible without the structural reforms implemented over the last two decades. Opening the sector to competition was not a one-time event. The gradual nature of the process is reflected in differences in the com-

Sector	2004	%	2005	%	2006	%	2007	%
Fixed lines	4,508,809	18.3	4,275,854	17.3	4,363,263	16.4	4,402,324	15.7
Internet infrastructure	679,000	2.7	774,000	3.1	830,000	3.1	999,000	3.6
TV: Cables, Satellite	3,010,000	12.2	3,111,000	12.6	3,375,735	12.7	3,472,818	12.4
International Carriers	1,505,484	6.1	1,633,809	6.6	1,845,262	6.9	1,724,649	6.1
Mobile	13,368,846	54.3	13,290,824	53.7	14,383,275	54.0	15,511,548	55.2
NTP (Network Termination Point)	455,145	1.8	476,021	1.9	550,972	2.0	498,212	1.7
Internet interconnection (ISP)	1,115,085	4.6	1,169,932	4.7	1,313,210	4.9	1,497,998	5.3
Total	24,642,369	100%	24,731,440	100%	26,661,716	100%	28,106,550	100%

Source: IMOC

based on the ease of switching service providers, chasing after customers, and maintaining them through tempting offers.

Since the role of price for the similar services between rival service operators has been minimized, the role of service quality and orientation has been become significant. Service delivery and quality have been characterized as a perceived category from the customer's point of view. Service quality and employee service orientation, as perceived by the customers, is an index of measurement the quality of service provided by the firm. Service employees are responsible for providing service, and they play a main role in the value chain perceived by the customers. Service orientation of employees is an index for service quality perception and assessment by the customers. This research is focused on the resolution

petitiveness in the different sub-sectors. The degree of competition is influenced in no small part by the obstacles encountered by the structural reforms, as well as technological, institutional and economic constraints.

Over the course of the development of the industry, in the transition from a period of rapid growth to more moderate growth, expressed in a slowing of the rate of technological innovation and applications, the results of business activity and loss of market segment indicate a transition to a stage of sector maturation. In contrast to competition over a product or a price in the sector during the infancy stage, competition in a mature industry tends to focus mainly on service. The transition to maturity in the sector has been characterized by increasing the role of cost and service oriented competition (Porter, 1980). Experience with competition in the field of cellular communications and international long distance calls shows a balance in average prices for identical services among competing companies, abandonment by customers

2. table

Sectorial share of Telecom market income				
Sector	2004	2005	2006	2007
Fixed lines	18.3	17.3	16.4	15.7
Internet infrastructure	2.7	3.1	3.1	3.6
TV: Cables, Satellite	12.2	12.6	12.7	12.4
International Carriers	6.1	6.6	6.9	6.1
Mobile	54.3	53.7	54.0	55.2
NTP (Network Termination Point)	1.8	1.9	2.0	1.7
Internet interconnection (ISP)	4.6	4.7	4.9	5.3
Total	100%	100%	100%	100%

Source: IMOC

of current and future business problems. After opening the local fixed telephone calls market to competition, a similar process is expected to occur as occurred after the opening of the cellular and international calls markets to competition. This includes: customer abandonment and movement, followed by a price balance which minimize the price component in the mature sector. The main focus of competition in the industry will be focused on the existing customers' safe-keeping and increasing the market volume via service quality which is provided to the customers, focusing on: market, customer and service orientations. The orientation on the customer's needs and customer's point of view on business has acquired different dimensions and today it is possible to find terms such as "Market orientation" (Kohli & Jaworski, 1990; Narver & Slater, 1990; Ruekert, 1992), "Marketing orientation" (Payne, 1988; Gummesson, 1991; Chiou & Chang, 2009), "Customer orientation" (Kelley, 1990), "Integrated marketing" (Felton, 1959), and "Marketing community" (Messikomer, 1987). Shapiro (1988), when discussing this topic, suggests that the terms market orientation, marketing orientation, customer orientation, meaning to be close to the customer, are so similar that it is hard to establish a distinction among them.

Service itself could be performed as an act that creates benefits for customers (Lovelock & Wright, 2002). A broad differentiation between marketing of services and physical goods includes four structural dimensions: intangibility, inseparability, variability, and perishability (Strouse, 1999). The service orientation concept in marketing is a thinking process based on 'value' theories (Kleinaltenkamp & Jacob, 2002). Many scholars and researchers are finding that service orientation, which is based on service excellence, brings superior customer value (Lynn et al., 2000; Yoon et al., 2007). For companies that provide services it is extremely important to understand the service processes, especially when cultural change has been required (Arbaugh & Sexton, 1997; Claver et al., 2000). Hogan et al. (1984) defined a personality construct for service. According to Hogan et al. (1984) service orientation is associated with characteristics such as: being cooperative, self controlled, dependable, well-adjusted, courteous, considerate and tactful. Hogan et al. (1984) developed a Service Orientation Index (SOI). Lytle et al. (1998) developed a ten dimension service orientation scale (SERV*OR). A decade later, Akesson at al. (2008) argued that the notion of "service orientation" is constituted by four essential elements: "Human-resource management" (HRM), "Service systems", "Service encounters" and "Service leadership".

CHAIT ET AL. (2000) EXPLORE BIODATA AS AN ALTERNATIVE FORMAT FOR MEASURING SERVICE ORIENTATION.

The findings of Kim et al. (2003, p.67) indicate that age, gender, marriage and education have not had a significant impact on service orientation, however "employees with a longer length of service and those in supervisory positions displayed a higher degree of service orientation...employees in each unit of the chain displayed significant differences in service orientation". Service quality, or more importantly for the marketers, perceived service quality from the customers' point of view, means providing the excellence or superiority of a product based on perceptions of what is promised and what is given (Zeithaml, 1988). Findings suggest that customers perceive quality as multidimensional factors (Zeithaml & Bitner, 1996; Parasuraman et al. 1985; Cronin & Tailor, 1992). The SERVQUAL five dimensions (reliability, responsiveness, empathy, assurance, tangibles) gap model for measurement of service quality (Parasuraman et al., 1988), suggests that differences between consumers' expectations and assessment of actual performance in fact, drives perceptions of quality.

Cronin & Tailor (1992) critiqued the SERVQUAL model and suggested that service quality can be conceptualized as "similar to an attitude" and can be operationalized by an "adequacy-importance" model. In the SERVPERF model service quality is determined only by "performance" instead of the "performance-expectation" gap of SERVQUAL model.

"Today, in changing economic and competitive business environment, it is extremely important for profit and non-profit organizations to assess customers' perception of service."

GOAL AND METHODOLOGY

Today, in changing economic and competitive business environment, it is extremely important for profit and non-profit organizations to assess customers' perception of service. Service quality leads mostly to customer satisfaction and loyalty, and service

providers' orientations make a contribution to companies' business performance. In Israel, service quality and service orientation in telecommunication have been researched in one service provider company only (Molochny, 2008). The current report is based on comprehensive research of telecommunication sector. The authors investigated the proposed model in two modes:

1. single service provider to multiple business customers (B2B) relationships, and
2. multiple service providers (mix of three cellular infrastructure companies (Orange, Cellcom, Pelephone), copper lines infrastructure company (Bezeq) and cable infrastructure company (HOT)) to consumers (B2C) relationships.

Service delivery and quality have been characterized as a perceived category from the customer's point of view. Service quality and employee service orien-tation, as perceived by the customers, is an index to measure the quality of service provided by the firm. Service employees are responsible for providing service, and they play a main role in the value chain perceived by the customers. Service orientation of employees is an index for service quality perception and assessment by the customers.

The importance of the present research is in its being an additional alternative source for telecommunication sector companies in acquiring data for marketing, operational, and HRM strategy. Based on the above, the research question is: „What is the correlation between the perceived personnel service orientation and the perceived service quality of the telecommunication company from the employees' and the external customers' viewpoints?" The theoretical target of the research is acquisition of new knowledge in the services marketing sphere, service quality perception, service orientation, cultural environment and the interaction between them in the telecommunication companies in Israel. The practical target of the research is to recommend an improved service strategy to the companies' top management and introduce the local experient to other countries. The adoption of the new strategy, will supply the company with the proper instruments for handling a recognized problem. Figure 1 presents the theoretical model of research. (1. figure)

Hypotheses:

1. There exists a positive correlation between personnel service orientation perceived by customers (CSO) and service quality perceived by customers (CSQ).

2. There exists a positive correlation between personnel service orientation perceived by themselves (service providers) (PSO) and service quality perceived by service providers (personnel) (PSQ).

3. There exists a positive correlation between personnel service orientation perceived by customers (CSO) and service quality perceived by service providers (personnel) (PSQ).

4. There exists a positive correlation between personnel service orientation perceived by themselves (service providers) (PSO) and service quality perceived by customers (CSQ).

5. There exists a positive correlation between personnel service orientation perceived by themselves (service providers) (PSO) and personnel service orientation perceived by customers (CSO).

6. There exists a positive correlation between service quality perceived by service providers (personnel) (PSQ) and service quality perceived by customers (CSQ).

1. figure
Research Framework
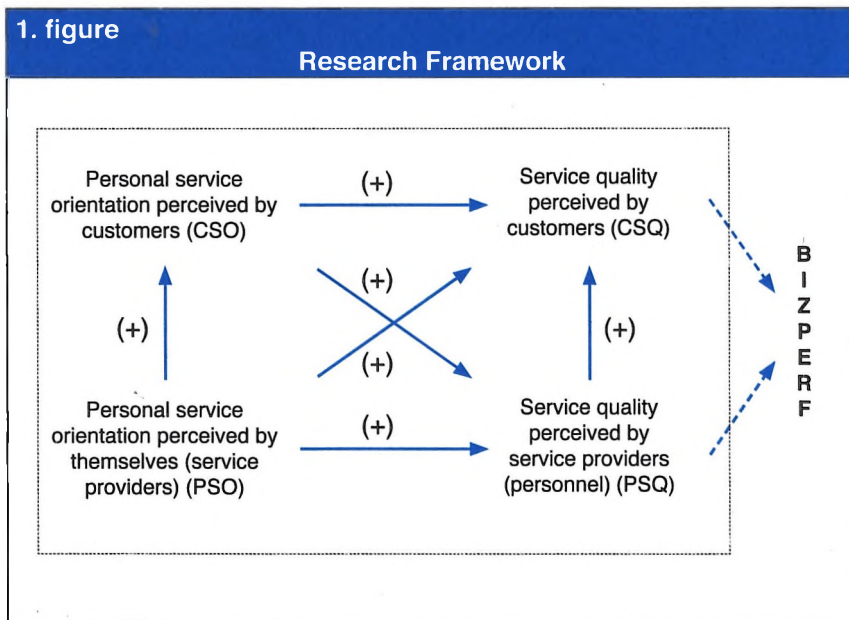
The research population of the present report is a mix of:

1. single service provider to multiple business customers (B2B) relationships- employees of the telecommunication company who involved in satellite service provision positions, and work at service center, and customers of the international phone companies who receive services at their service centers (Molochny, 2008).

2. multiple service providers to consumers (B2C) relationships - mix of three cellular infrastructure companies (Orange, Cellcom, Pelephone), copper lines infrastructure company (Bezeq) and cable infrastructure company (HOT)).

The method of gathering the data, as quasi-interval data, allows use of descriptive statistical means. It was decided to use an index with a tendency towards the center, summarizing and emphasizing special characteristics of the distribution of the phenomenon being studied – the mathematical mean. According to Aisenbach (1998), the mean allows reflecting a phenomenon on a general level. The mean does not necessarily describe the value existing within a series of data, and is influenced by all of the values, particularly extreme values. The Standard Deviation (σ) is the square root of the variance, an index that is accepted and practical for describing the distribution of the values of the statistical series, around the mean.

In order to initially process the raw data, it was decided to use the Standard Deviation distribution index, which, together with the mean, is the basis for additional indices testing the research hypotheses. The Standard Deviation, like the mean, is affected by extreme values, but also allows expression of an opinion regarding the distance of most values of the variable (for every distribution) within three Standard Deviations from the average (99.72%).

The data was processed using the SPSS statistical processing program.

RESULTS

In order to examine the research hypotheses, and in accordance with the research questions regarding the existence of a statistical correlation between the variables, the Pearson coefficient is an index satisfying the research needs. The SPSS software, previously mentioned, allows calculation of Pearson coefficients, after feeding the raw research data (note: means, SD and Pearson coefficients for all of the variables will be achieved together, at the same stage after feeding the data into the SPSS program). As mentioned above, within the framework of the present research, there is only one source for receipt of the necessary data. The assumption of the researcher is in keeping with Beyth-Marom (1986), that the respondent provides information to the researcher in response to his or her most recent request. The researcher is interested in topics that he or she has no possibility of learning about through observation, and he or she must receive the necessary information from the respondent. Therefore, the method for gathering information is through questioning. In order to ensure the reliability of the statistical analyses, the present research included a quantity of respondents greater than the necessary minimum. The sampling process of the client circle was mainly determined by the research limitations (time and budget), and was focused only on Hebrew speakers, in order to avoid the necessity of translation and re-validation of the research instruments. Therefore, an entire sector of the population is prevented from being chosen for the sample, and the sample is a non-probability sample. The basic assumption behind service provision is equality in the nature and quality of customer service, no matter what the volume of the service consumption is. Therefore, the decision to sample an equal quota of customers from each service provider solves the problem of degree of representation as presented by Beyth-Marom (1986).

In the B2B mode (Molochny, 2008) the author collected 32 questionnaires from service providers and 50 questionnaires from customers. Fourteen (14) customer respondents were „singles" (who received service from the same service shift) and were paired with fourteen (14) service providers. Thirty-six (36) customer respondents were „doubled" (who received service from two shifts) and were paired with eighteen (18) service providers. In order to keep the homogeneity of the collected data, the average value of „doubled" sources was count .

The SPSS processing has provided the following output: Customer perception of personnel Sevice Orientation (CSO) equals 3.984 (Mean) and 0.3102 (St.Dev); Customer percepton of Service Quality (CSQ) equals 4.356 (Mean) and 0.3767 (St. Dev.); Personnel perception of Service Orientation (PSO) equals 4.328 (Mean) and 0.3134 (St.Dev.); Personnel perception of Service Quality (PSQ) equals 4.194 (Mean) and 0.5611 (St. Dev.).

The reliability of the instrument (Cronbach's α (alpha)) equals 0.61.

Pearson's CSO/CSQ correlation coefficient

equals 0.626 (P<0.05); CSO/PSQ correlation coefficient equals 0.216; PSO/ CSQ correlation coefficient equals 0.134; PSO/PSQ correlation coefficient equals 0.671 (P<0.05), PSO/CSO correlation coefficient equals 0.340; PSQ/CSQ correlation coefficient equals -0.003.

In the B2C mode the author collected 348 questionnaires: 174 questionnaires from service providers and 174 questionnaires from customers (Cellcom (68), Orange (68), Pelephone (70), HOT (72), Bezeq (70)). The research findings presented in the Table 3 and Figure 2 and 3 correspondingly.

For the entire sample, SPSS processing has provided the following output: Customer perception of personnel Service Orientation (CSO) equals 4.924 with Standard Deviation (St.D) equals 0.0502, when Customer perception of Service Quality (CSQ) equals 4.879 and St.D 0.1389 correspondingly. It was found that Personnel perception of Service Orientation (PSO) equals 4.933 with St.D of 0.0561 with the similar high level of Personnel perception of Service Quality (PSQ) equals 4.931 and 0.1213 of St.D. The reliability of the instrument (Cronbach's α (alpha)) equals 0.6.

Additionally, it was calculated Pearson's coefficients for the described model. The Pearson CSO to CSQ correlation coefficient equals 0.569; CSO to PSQ correlation coefficient equals 0.259; PSO to CSQ correlation coefficient equals 0.279; PSO to PSQ correlation coefficient equals 0.406; PSO to CSO correlation coefficient equals 0.484 and PSQ to CSQ correlation coefficient equals 0.189 (2. figure).

DISCUSSION

Choice of the research approach was based on the researcher's awareness of the triangulation method (Saunders et al., 2000), in order to complete gathering and verifying data. Because of research limitations (time and budget), a decision was made to use only the quantitative method (3. figure).

According to the research question regarding the existence of a correlation between the variables as they exist in reality, without any manipulation, and according to Beyth-Marom's contention (1986), the research approach is classified as a correlative quantitative research. The aim of the research was the assessment of correlations between service orientation of service providers and service quality perceived by customers and service providers. In the B2B mode the researched processes happened on the edge between two organizations where one provides services and the another receives services (Zeithaml & Bitner, 1996), service provider is a governmental company and customers are private companies. These customers overturn to service providers then deliver final service to their internal and external customers. The author suggests that in the assessment of service orientation on the perceptual level, customers compare service orientation of service providers with themselves. Table 3 exibits the research findings (3. table).

Service orientation: the research findings present the lower perception of service orientation of service providers perceived by customers in B2B mode (CSO: 68.26% of respondents reported from 3.67 to 4.29;
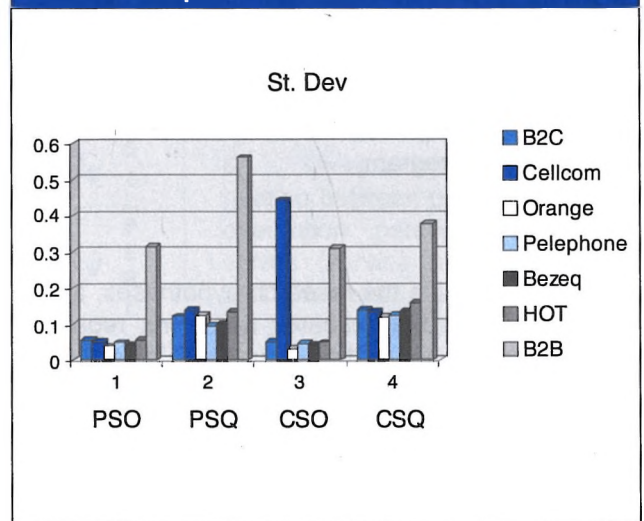

2. figure
Descriptive Statistics: Mean

Means
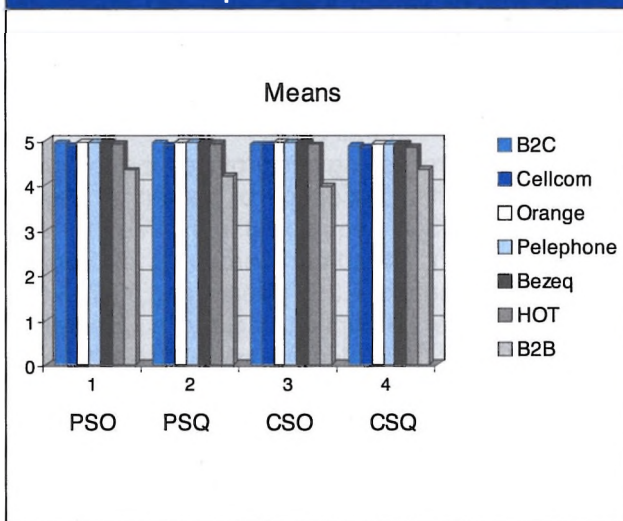
3. figure
Descriptive Statistics: St. Deviation

St. Dev

3. table Research findings					
	PSO	**PSQ**	**CSO**	**CSQ**	
Entire B2C sample	4.933	4.931	4.924	4.879	Mean
(N=348)	0.0561	0.1213	0.0502	0.1389	St.Dev
Cellcom	4.884	4.889	4.893	4.831	Mean
(N=68)	0.0519	0.1402	0.4441	0.1337	St.Dev
Orange	4.962	4.941	4.955	4.919	Mean
(N=68)	0.0381	0.1239	0.0329	0.1187	St.Dev
Pelephone	4.954	4.957	4.935	4.900	Mean
(N=70)	0.0495	0.0955	0.0464	0.1242	St.Dev
Bezeq	4.952	4.950	4.945	4.914	Mean
(N=70)	0.0407	0.1014	0.0412	0.1348	St.Dev
HOT	4.914	4.917	4.893	4.833	Mean
(N=72)	0.0571	0.1336	0.0481	0.1581	St.Dev
B2B Sample:	4.328	4.194	3.984	4.356	Mean
(N=64)	0.3134	0.5611	0.3102	0.3767	St.Dev

95.44% of respondents reported from 3.36 to 4.6) than by service providers (PSO: 68.26% of respondents reported from 4.01 to 4.64; 95.44% of respondents reported from 3.7 to 4.96) and correspondingly very similar perception in B2C mode (CSO: 68.26% of respondents reported from 4.87 to 4.97; 95.44% of respondents reported from 4.82 to 5.00) than by service providers (PSO: 68.26% of respondents reported from 4.88 to 5.00; 95.44% of respondents reported from 4.82 to 5.00). This finding is similar to different researches where was found different perception of service orientation between governmental and private sectors (Lynn et al. 2000). There is a potential for positive change of service orientation of governmental service providers and improvement company's image.

Service Quality: in the B2B mode the research findings present higher perception of service quality perceived by customers (CSQ: 68.26% of respondents reported from 3.98 to 4.73) than by service providers (PSQ: 68.26% of respondents reported from 3.63 to 4.76), and in the B2C mode the research findings present lower perception of service quality perceived by customers (CSQ: 68.26% of respondents reported from 4.74 to 5.00) than by service providers (PSQ: 68.26% of respondents reported from 4.81 to 5.00). Service quality constitutes the base for generalization of planning quality, technical quality, delivery quality and relationships with customers (Gronroos 2000). In the gap model of service quality (Zeithaml & Bitner 1996) the gaps in the edge between service providers and customers who get service comprises a base for further assessment of quality of service. In the finding the author found the positive influence of the distinctions in assessments, which causes to Kaizen (continuous improvement) of service provider organization. The analysis and discussion of hypotheses was mostly supported by previous researchers:

1. In the findings was found the positive significant correlation between personnel service orientation perceived by customers (CSO) and service quality perceived by customers (CSQ). Other sources (Hogan et al. 1984) reported about the above correlation in different fields like insurance companies, nurse schools, truck drivers. Perception of service orientation of service providers by customers increases feelings about service delivery in dimensions of reliability, responsiveness, assurance (Zeithaml & Bitner, 1996);

2. In the finding was found very strong and significant positive correlation between service quality perceived by service providers (personnel) (PSQ) and personnel service orientation perceived by themselves (service providers) (PSO). The author suggests that this finding reflects a positive influence

of big, strong entity and low employee turnovers;

3. In the finding was found weak and not significant positive correlation between personnel service orientation perceived by customers (CSO) and service quality perceived by service providers (personnel) (PSQ). The reasons for such result probably are the absence of such a correlation and/or usage of different instrument like a quality research;

4. In the finding was found weak and not sig-nificant positive correlation between personnel service orientation perceived by themselves (service providers) (PSO) and service quality perceived by customers (CSQ). The author assumes that factors responsible for such phenomena are gaps in perceptions between governmental workers and private companies (Gap model by Zeithaml & Bitner 1996) and/or brand/image positioning (4Q Model of Offering Quality by Gummesson, 2000).

5. In the finding was found intermediate positive correlation between personnel service orientation perceived by themselves (service providers) (PSO) and personnel service orientation perceived by customers (CSO) in B2B mode and significant positive correlation in B2C mode. The author suggests that special personal training and different Marcom activity are responsible for such misbalance.

6. It was not found a reasonable encouragement for supporting the hypothesis of existence a positive correlation between service quality perceived by service providers (personnel) (PSQ) and service quality perceived by customers (CSQ).

SUMMARY

In changing economic and business environment, marketing strategies play central role in achieving competitive superior values mostly in customer's perceptions and minds.

Service quality leads to customer satisfaction and loyalty, and service providers' orientations make a contribution to companies' business performance.

Over the course of the development of the industry, in the transition from a period of rapid growth to more moderate growth, expressed in a slowing of the rate of technological innovation and applications, the results of business activity and loss of market segment indicate a transition to a stage of sector maturation.

During its infancy stage, competition in the telecommunication sector has been focused on price and product competition. The local experience of the oligopoly competition in the telecom market indicates that the prices have been balanced for similar services between the rival firms. Since the role of price for the similar services between rival service operators has been minimized, the role of service quality and orientation has been become significant.

Or in the other words in contrast to competition over a product or a price in the sector during the infancy stage, competition in a mature industry tends to focus mainly on service.

The current report is based on comprehensive research of telecommunication sector.

The authors investigated the proposed model in two modes: 1) single service provider to multiple business customers (B2B) relationships, and 2) multiple service providers (mix of three biggest cellular infrastructure companies (Orange, Cellcom, Pelephone), copper lines infrastructure company (Bezeq) and cable infrastructure company (HOT)) to consumers (B2C) relationships.

Service quality and employee service orientation, as perceived by the customers, is an index to measure the quality of service provided by the firm. Service employees are responsible for providing service, and they play a main role in the value chain perceived by the customers.

The research findings indicate on correlations between service orientation of service providers perceived by customers and employees, and quality of delivered service, perceived by the same groups. External business customers and consumer customers appreciate service quality distinguishably than service providers. Business performances of the companies indirectly reflect such findings. Mobile communication sector catches more than 54% of the local telecom market's pie and brings approximately 3.8 Billion USD yearly. For example, during 2005 to 2007 Cellcom increased the number of subscribers by 18% from 2.603 million to 3.073 million subscribers, Pelephone increased the number of subscribers by 15% from 2.28l million to 2.622 million subscribers and Orange increased the

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* Source: IMOC: depends by USD/NIS exchange rate.

number of subscribers by 13% from 2.529 million to 2.860 million subscribers with average market ARPU of 37 USD*. In 2006-2007 Orange reported ARPU of 158 NIS, then Pelephone increased its ARPU from 131 NIS to 138 NIS.

The successful marketing strategy improves perceptions of service orientation and service quality both by service providers and by customers, and leads to better customers' satisfaction and loyalty, company competitive ability and business targets achievement.

We are open to hear about collaboration with research centres and partnership with service sector companies for a fruitful cooperation in assessment, formulation and implementation of new business, operations and HRM strategies.

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