

Records Management and Clients Tracking System in Selected Insurance Firms in Metro Manila: Inputs to Improve Operation

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ABSTRACT

The study assessed the effectiveness of records management and client tracking systems in selected insurance firms in Metro Manila and examined their implications for operational improvement. Anchored on the Records Lifecycle Theory of Schellenberg and Customer Relationship Management Theory of Buttle, the study investigated records management in terms of document classification and indexing, filing and indexing systems, records storage and preservation, access and retrieval control, data privacy and security control, and records retention and disposal policy. Likewise, the client tracking system was evaluated in terms of client information database management, policy renewal monitoring, claims and service ticket tracking and updates, communication and feedback mechanisms, and unified client profiles. Using a descriptive research design, data were gathered from 151 respondents composed of management personnel, staff, and clients from selected insurance firms in Metro Manila. Results revealed that records management practices were generally assessed as Highly Evident, with data privacy and security control obtaining the highest assessment. Document classification and indexing, filing systems, records storage and preservation, access and retrieval control, and retention and disposal policies were likewise rated highly. The findings indicate that effective records governance and client tracking mechanisms contribute significantly to operational efficiency, regulatory compliance, information accessibility, and service quality. Based on the findings, an operational improvement plan was developed to strengthen records governance, enhance client tracking capabilities, and improve organizational performance.

Keywords: Records Management, Client Tracking System, Insurance Firms, Data Privacy, Information Governance, Customer Relationship Management

INTRODUCTION

In today's information-driven business environment, records management and client tracking systems have become indispensable components of organizational success. Organizations increasingly rely on accurate, accessible, secure, and timely information to support decision-making, regulatory compliance, operational efficiency, and customer service. Within the insurance industry, effective records management ensures that policy documents, claims records, underwriting information, and customer data are systematically maintained throughout their lifecycle. Simultaneously, client tracking systems facilitate monitoring of policyholders, claims processing, service requests, policy renewals, and customer interactions.

Globally, insurance organizations have invested heavily in digital transformation initiatives to strengthen information governance and customer relationship management. Advanced technologies such as cloud-based records management systems, integrated databases, artificial intelligence-driven customer relationship platforms, and automated document processing systems have significantly improved records accessibility, security, and operational efficiency. These innovations support compliance with regulatory requirements while enhancing customer satisfaction and organizational competitiveness.

In the Philippine insurance industry, however, several operational challenges continue to affect records management and client tracking systems. Insurance firms face issues related to document classification, storage, retrieval efficiency, records retention, privacy compliance, customer database management, claims monitoring,

and communication effectiveness. As insurance transactions become increasingly complex, organizations must strengthen their information management capabilities to ensure operational continuity and service excellence.

Metro Manila serves as the country's principal financial and commercial center, where insurance companies manage substantial volumes of records and customer transactions. The growing demand for efficient services, secure information handling, and regulatory compliance underscores the need to evaluate existing records management and client-tracking practices. Despite their strategic importance, few empirical studies have examined their effectiveness from the perspectives of management personnel, staff members, and clients.

This study therefore assessed the effectiveness of records management and client-tracking systems among selected insurance firms in Metro Manila and developed operational improvement recommendations. The findings provide valuable insights for insurance organizations seeking to strengthen information governance, improve customer service, and enhance overall organizational performance.

LITERATURE-BASED RESEARCH FRAMEWORK

The study was anchored on the Records Lifecycle Theory developed by Theodore Roosevelt Schellenberg and the Customer Relationship Management Theory developed by Francis Buttle. These theories provide a comprehensive framework for understanding the interrelationship between records management and client tracking systems within insurance organizations.

The Records Lifecycle Theory posits that records pass through several stages, including creation, classification, storage, retrieval, utilization, retention, and disposal. Effective management throughout these stages ensures accessibility, accountability, security, and compliance. The theory directly supports the records management dimensions examined in this study, namely document classification and indexing, filing and indexing systems, records storage and preservation, access and retrieval control, data privacy and security control, and records retention and disposal policy.

Customer Relationship Management Theory emphasizes the strategic management of customer information and interactions to improve service delivery, customer satisfaction, loyalty, and organizational performance. The theory explains how integrated client databases, communication channels, monitoring systems, and feedback mechanisms contribute to effective customer relationship management. It supports the dimensions of client information database management, policy renewal monitoring, claims and service ticket tracking, communication and feedback mechanisms, and unified client profiles.

The integration of these theories suggests that effective record governance serves as the foundation for efficient client-tracking systems. Well-organized records enable timely access to customer information, facilitate claims processing, support policy administration, and strengthen customer relationships. Consequently, improvements in records management are expected to enhance client tracking effectiveness and overall operational performance.

METHODOLOGY

Research Design

The study employed a descriptive research design to assess the effectiveness of records management and client tracking systems in selected insurance firms in Metro Manila. Descriptive research was appropriate because it enabled the researcher to systematically collect, analyze, and interpret information regarding existing organizational practices without manipulating variables. The design facilitated a comprehensive assessment of records management and client-tracking practices as perceived by management personnel, staff, and clients.

Respondents and Sampling

The study involved 151 respondents composed of 11 management personnel, 107 staff members, and 33 clients from selected insurance firms in Metro Manila. Proportionate random sampling was utilized to ensure adequate representation from each respondent group. The respondents were selected for their direct involvement in records management, customer service, policy administration, and client interactions.

Research Instrument

Data were collected using a researcher-developed survey questionnaire consisting of five sections: respondent profile, records management assessment, client tracking system assessment, challenges encountered, and acceptability of the proposed operational improvement plan. The instrument was validated by experts and reliability tested prior to administration.

Statistical Treatment

The study used frequency and percentage distributions, the weighted mean, one-way analysis of variance (ANOVA), Tukey's Honestly Significant Difference (HSD) Test, and the Pearson Product-Moment Correlation Coefficient. These statistical tools were used to describe respondent profiles, determine assessment levels, identify significant differences among respondent groups, and examine relationships between variables.

RESULTS AND DISCUSSION

Profile of the Respondents

The study involved 151 respondents from selected insurance firms in Metro Manila, consisting of 11 management personnel (7.3%), 107 staff members (70.9%), and 33 clients (21.9%). The distribution indicates that the majority of respondents were staff members who are directly involved in the day-to-day implementation of records management and client tracking activities. Their participation provided substantial operational insights into the effectiveness of records governance and customer information management practices within the organizations.

Most respondents belonged to the 26–30-year-old age group (34.4%), followed by those aged 31–35 (25.2%). The findings suggest that the respondents were primarily young and middle-aged professionals actively engaged in organizational operations. In terms of educational attainment, the majority held bachelor's degrees (66.9%), indicating that respondents had adequate educational backgrounds to evaluate organizational records management and client tracking systems. Furthermore, most respondents were single (60.9%), while male respondents slightly outnumbered females. These characteristics indicate that the study reflects the perspectives of a relatively educated and professionally active workforce.

Records Management

Document Classification and Indexing

Document classification and indexing obtained an overall weighted mean of 4.27, interpreted as Highly Evident. This result indicates that the selected insurance firms have established systematic procedures for organizing records into standardized categories and using indexing mechanisms that facilitate the efficient identification and retrieval of information. Management personnel provided the highest assessment (WM = 4.59), while staff and clients assessed the dimension as Evident.

The highest-rated indicators were "Indexing allows records to be easily distinguished by client, policy number, and transaction type" and "Classification systems are regularly reviewed to reflect operational and regulatory changes," both obtaining a weighted mean of 4.31. These findings indicate that insurance firms recognize the importance of maintaining classification systems that support operational efficiency and compliance

requirements. Effective classification structures allow organizations to locate records quickly, reduce duplication, and improve records accessibility.

The findings further suggest that employees generally understand and follow established classification structures. The integration of physical and digital records systems also received high ratings, indicating that organizations are successfully adapting traditional records management practices to modern digital environments. These results support Schellenberg's Records Lifecycle Theory, which emphasizes the systematic organization and maintenance of records throughout their lifecycle.

The findings are consistent with the discussion of Barangay Automated Records Solution (2025), which emphasized that effective records classification and indexing systems improve information accessibility, reduce retrieval time, and enhance operational performance. Proper classification and indexing support organizational efficiency by ensuring that records remain accessible, organized, and usable whenever needed.

Table 1 Summary Assessment of Document Classification and Indexing

Indicator Category	Assessment
Overall Weighted Mean	4.27
Verbal Interpretation	Highly Evident
Highest-Ranked Indicators	Indexing by Client/Policy Number; Regular Classification Review
Lowest-Ranked Indicators	Correction of Misfiled Records; Indexing Contribution to Decision-Making

Filing and Indexing System

The filing and indexing system obtained an overall weighted mean of 4.26, interpreted as Highly Evident. The result indicates that insurance firms maintain structured filing procedures that support efficient storage, retrieval, and management of organizational records. Management personnel again provided the highest assessment (WM = 4.56), while staff and clients rated the system as Evident.

The highest-rated indicators were employee training on filing procedures and the system's ability to support quick retrieval during audits and client inquiries, both obtaining a weighted mean of 4.30. These findings demonstrate the importance of employee competence and retrieval efficiency in maintaining effective records management systems.

Real-time updates to indexing tools, such as databases, logs, and file systems, also received a high rating. This suggests that organizations recognize the need to maintain accurate, up-to-date records and inventories. The systematic arrangement of records and the minimization of duplication and record loss further indicate that filing systems are functioning effectively.

The findings suggest that filing and indexing systems contribute significantly to records accessibility, operational efficiency, and service responsiveness. However, the comparatively lower assessment regarding the maintenance of both manual and electronic filing systems indicates opportunities for further integration and modernization of filing processes.

Records Storage and Preservation

Records storage and preservation obtained an overall weighted mean of 4.29, interpreted as Highly Evident. The findings indicate that insurance firms have established strong storage and preservation practices that support records security, integrity, and long-term usability. Management personnel rated this dimension highest (WM = 4.63), while staff and clients assessed it as Evident.

The highest-rated indicator was "Preservation practices support business continuity" (WM = 4.34). This finding highlights the critical role of records preservation in sustaining insurance operations, claims processing, and customer service activities. Records protected against unauthorized access and disasters also received high ratings, demonstrating the firms' commitment to safeguarding information assets.

Secure storage environments, adequate infrastructure, regulatory compliance, and regular upgrading of storage practices were likewise assessed favorably. These findings suggest that the organizations understand the strategic importance of preserving records to support organizational continuity and compliance requirements.

The results align with the National Archives of the Philippines Electronic Records Management Policy (2021), which emphasizes secure storage, regular backups, preservation strategies, and disaster preparedness as essential elements of effective records governance.

Access and Retrieval Control

Access and retrieval control obtained an overall weighted mean of 4.26, interpreted as Highly Evident. The findings indicate that insurance firms have implemented effective mechanisms to regulate access to records and monitor retrieval activities. Management respondents again provided the highest assessment (WM = 4.58).

The highest-rated indicator was "Access to records is restricted based on job roles and responsibilities" (WM = 4.30). This demonstrates the firm's strong adherence to role-based access principles, ensuring that sensitive information is only accessible to authorized personnel.

Confidential record protection and retrieval controls that reduce errors and unauthorized alterations were also highly rated. These findings indicate that organizations have implemented safeguards that protect information integrity and confidentiality.

The findings support the National Privacy Commission's guidelines on organizational, technical, and physical safeguards. Effective access control mechanisms contribute to information security, accountability, and regulatory compliance while supporting efficient records retrieval.

Data Privacy and Security Control

Among all records management dimensions, data privacy and security control had the highest overall weighted mean of 4.34, indicating a level of Highly Evident. This result indicates that insurance firms place substantial emphasis on protecting sensitive client information and ensuring compliance with privacy regulations. Management respondents provided an exceptionally high assessment (WM = 4.76).

The highest-rated indicator was "Security systems are regularly updated and tested" (WM = 4.38), followed closely by employee awareness of privacy policies and prompt responses to data breaches or risks. These findings demonstrate that organizations actively maintain and improve their security environments.

The results further indicate that privacy controls strengthen client trust, reduce legal and reputational risks, and support compliance with the Data Privacy Act of 2012 (RA 10173). Access restrictions on confidential information and encryption measures were likewise highly assessed.

The findings align with Kron Technologies (2021), which emphasized that effective privacy and security controls require a combination of policy frameworks, employee awareness, technological safeguards, and continuous monitoring. Together, these measures support the protection of sensitive information and organizational credibility.

Records Retention and Disposal Policy

The records retention and disposal policy obtained an overall weighted mean of 4.27, indicating it is Highly Evident. This indicates that insurance firms have established procedures governing records retention periods and disposal activities. Management respondents provided the highest assessment (WM = 4.57).

The highest-rated indicator was "Retention policies support audit and compliance needs" (WM = 4.30). This finding demonstrates that organizations recognize the importance of retention schedules in supporting regulatory compliance and audit readiness.

The enforcement of retention policies across departments and the role of disposal practices in reducing storage costs and risks were also highly rated. Employees generally appear aware of retention and disposal guidelines, indicating that the organization is promoting compliance and accountability.

Overall, the findings suggest that records retention and disposal policies contribute significantly to information governance, operational efficiency, and compliance management. These practices ensure that records are retained for appropriate periods while minimizing risks associated with excessive storage and unauthorized information retention.

Client Tracking System

Client Information Database Management

Client Information Database Management is a fundamental component of the client tracking system, serving as the primary repository for customer records, policy details, contact information, transaction history, and service interactions. In insurance firms, an effective client database supports operational efficiency by providing accurate, up-to-date information that can be accessed whenever needed. According to Customer Relationship Management (CRM) Theory, the effective management of customer information enables organizations to strengthen relationships, improve service delivery, and enhance customer retention.

The findings indicate that client information database management was assessed favorably by management personnel, staff, and clients. The result suggests that insurance firms maintain organized client databases that enable timely access to information, reduce record duplication, and facilitate decision-making. Accurate client databases are particularly important in the insurance industry because they support underwriting, claims processing, policy administration, and customer service.

Respondents generally perceived that client information is systematically recorded, updated, and secured. This indicates that firms recognize the importance of maintaining reliable customer information systems that support efficient operations and customer relationship management. The findings imply that well-maintained client databases improve customer satisfaction by enabling personnel to respond more effectively to inquiries, claims, and policy-related concerns.

The results support the CRM Theory of Buttle (2004), which emphasizes that integrated client databases provide the foundation for effective customer relationship management. Organizations that maintain comprehensive customer information systems are better positioned to personalize services, improve responsiveness, and strengthen long-term customer relationships.

Policy Renewal Monitoring

Policy renewal monitoring is a critical activity in insurance operations because it directly influences customer retention and revenue sustainability. Effective monitoring systems enable organizations to identify expiring policies, communicate renewal reminders, and encourage continued policy coverage. The findings indicate that respondents positively assessed policy renewal monitoring practices, suggesting that insurance firms have established mechanisms to track policy expiration dates and follow up on renewals.

The favorable assessment implies that firms understand the importance of proactive customer engagement in maintaining long-term relationships. Timely policy renewal reminders help reduce policy lapses and improve customer retention rates. These practices contribute to organizational profitability because retaining existing clients is generally more cost-effective than acquiring new customers.

The findings further indicate that policy renewal monitoring supports customer convenience and enhances customer satisfaction. Clients are more likely to appreciate organizations that provide timely notifications regarding policy expiration and renewal opportunities. Consequently, effective monitoring systems contribute to both customer loyalty and operational efficiency.

From a CRM perspective, policy renewal monitoring represents an important customer retention strategy. Payne and Frow (2017) emphasized that customer retention initiatives strengthen customer relationships and improve organizational performance. The findings suggest that the participating insurance firms have implemented effective renewal monitoring systems that support long-term customer engagement.

Claims and Service Ticket Tracking and Updates

Claims processing is one of the most important functions within insurance organizations because it directly affects customer perceptions of service quality and organizational reliability. The findings indicate that respondents evaluated claims and service ticket tracking systems positively, suggesting that insurance firms have established procedures for monitoring claim progress, recording service requests, and updating clients on transaction status.

The results imply that firms recognize the importance of transparency and communication throughout the claims process. Effective tracking systems enable employees to monitor claims from submission through resolution and provide clients with timely updates on processing status. These capabilities contribute significantly to customer confidence and satisfaction.

The findings also suggest that tracking systems improve accountability by enabling personnel to monitor pending transactions, identify delays, and ensure the timely resolution of customer concerns. Such systems facilitate coordination among departments and support operational efficiency.

Laudon and Laudon (2022) explained that service tracking systems enable organizations to monitor requests systematically and improve service delivery performance. The findings support this perspective by demonstrating that claims and service ticket tracking improve customer service and operational effectiveness.

Communication and Feedback Mechanisms

Communication and feedback mechanisms obtained favorable assessments from respondents, indicating that insurance firms have established channels that facilitate interaction between the organization and its clients. Effective communication systems enable organizations to provide information, respond to inquiries, address concerns, and collect customer feedback.

The findings suggest that firms recognize the importance of maintaining open communication with clients throughout the customer lifecycle. Effective communication contributes to transparency, trust, and customer satisfaction. Customers who receive timely information regarding policies, claims, and service requests are more likely to develop positive perceptions of the organization.

Feedback mechanisms likewise play a critical role in organizational improvement. By collecting and analyzing customer feedback, organizations can identify service gaps, address concerns, and improve operational processes. The findings imply that insurance firms utilize feedback systems to support continuous improvement and enhance customer experiences.

The results align with Zeithaml et al. (2021), who emphasized that communication and feedback systems strengthen customer relationships and improve service quality. Effective communication fosters trust and enables organizations to respond proactively to customer needs.

Unified Client Profile

Unified client profiles represent an advanced customer information management practice that consolidates information from multiple sources into a single customer view. The findings indicate that respondents assessed

unified client profiles favorably, suggesting that insurance firms have made efforts to integrate customer information across organizational systems.

The existence of unified client profiles enables personnel to access comprehensive customer information, including policy history, claims records, communication logs, and service interactions. Such integration improves decision-making and facilitates personalized service delivery.

The findings further suggest that unified profiles contribute to operational efficiency by reducing information fragmentation and duplication. Employees can access relevant information quickly, thereby improving responsiveness and service quality.

According to Inmon et al. (2019), integrated customer data systems support informed decision-making and personalized customer experiences. The findings indicate that insurance firms are increasingly adopting practices that support comprehensive customer information management and relationship development.

Significant Difference in the Assessments of Respondents

Analysis of Variance (ANOVA) was utilized to determine whether significant differences existed among the assessments of management personnel, staff members, and clients regarding records management and client tracking system practices. The findings revealed significant differences in selected dimensions of records management and client tracking systems. These differences indicate that respondent groups possess varying perspectives based on their organizational roles, responsibilities, and levels of interaction with organizational processes.

Management personnel generally provided higher assessments than staff members and clients. This may be attributed to their greater involvement in policy formulation, strategic planning, and oversight activities. Staff members tended to focus on operational implementation, while clients evaluated the systems primarily based on their service experiences.

The findings imply that organizations should continue strengthening communication, transparency, and stakeholder engagement to ensure a shared understanding of records management and customer service practices. Addressing perception gaps can improve organizational alignment and service quality.

Significant Relationship Between Records Management and Client Tracking System

One of the most important objectives of the study was to determine whether a significant relationship exists between records management and client tracking systems. Based on the theoretical framework, effective records management is expected to support client tracking activities by ensuring that customer information remains accurate, accessible, secure, and up to date.

The findings revealed a significant positive relationship between records management and client tracking system practices. This indicates that improvements in document classification, filing systems, storage and preservation, access control, privacy management, and records retention contribute positively to customer information management, claims tracking, communication effectiveness, policy renewal monitoring, and unified client profiling.

The results support both the Records Lifecycle Theory and CRM Theory. Effective records governance ensures the availability and reliability of information, while efficient client-tracking systems leverage that information to improve customer service and organizational performance. The findings demonstrate that records management and client tracking systems are interdependent organizational functions that collectively contribute to operational excellence.

Challenges Encountered

The assessment of challenges encountered in records management and client tracking systems revealed that, while the overall implementation of these systems was effective, several operational concerns persisted.

Challenges in Records Management

Respondents identified concerns regarding document organization, retrieval efficiency, record security, storage limitations, and compliance monitoring. Although records management practices were generally assessed as highly evident, some respondents reported difficulties maintaining consistency in record classification, ensuring timely information retrieval, and integrating physical and electronic record systems.

Another significant challenge involved the increasing volume of organizational records. As insurance firms continuously generate policy documents, claims records, customer files, and compliance reports, records personnel face growing demands for storage capacity and information management. Without adequate technological support and systematic retention schedules, organizations may experience inefficiencies in record handling and retrieval.

Data privacy and security also emerged as critical concerns. Despite strong privacy controls, respondents recognized the continuing threat posed by cyberattacks, unauthorized access, data breaches, and information loss. The increasing digitization of records requires organizations to continuously strengthen cybersecurity measures and employee awareness programs to protect sensitive customer information.

These findings suggest that insurance firms should continuously improve records governance practices by investing in digital technologies, enhancing employee training, strengthening security infrastructure, and implementing more comprehensive records management policies.

Challenges in Client Tracking System

Respondents likewise identified challenges related to client information management, policy renewal monitoring, claims tracking, communication systems, and customer data integration. One recurring concern was maintaining up-to-date client information in organizational databases. Inaccurate or outdated customer information may affect service delivery, communication effectiveness, and customer satisfaction.

Another challenge relates to monitoring policy renewals and customer follow-up activities. As insurance firms manage numerous clients and policies simultaneously, delays in monitoring renewal schedules can lead to policy lapses and missed business opportunities. Effective monitoring mechanisms are therefore necessary to ensure timely customer engagement.

Claims and service ticket tracking likewise present operational challenges. Delays in updating claim status, incomplete transaction monitoring, and communication gaps may negatively affect customer perceptions of service quality. Respondents emphasized the importance of timely updates and transparent communication throughout the claims process.

The findings further indicate that integrating customer information across multiple organizational systems remains a challenge for some firms. The absence of fully integrated client databases may lead to information duplication, inconsistencies, and fragmented customer profiles. Consequently, organizations should continue investing in integrated customer relationship management platforms to improve information accessibility and service responsiveness.

CONCLUSIONS

Based on the findings of the study, the following conclusions were drawn:

1. The organizations have established effective systems for document classification and indexing, filing and indexing procedures, records storage and preservation, access and retrieval control, data privacy and security control, and records retention and disposal.
2. Data privacy and security control emerged as the strongest dimension of records management, indicating the firms' commitment to protecting sensitive information and complying with regulatory requirements.

3. Client tracking systems are effectively implemented among the participating insurance firms. The organizations maintain customer databases, monitor policy renewals, track claims and service requests, facilitate communication and feedback, and develop unified client profiles to support customer relationship management.
4. Significant differences exist among the assessments of management personnel, staff members, and clients regarding selected dimensions of records management and client tracking systems, reflecting differences in organizational roles and experiences.
5. A significant positive relationship exists between records management and client tracking systems. Effective records governance contributes directly to improved customer information management, communication, claims tracking, and service delivery.
6. Although the systems are generally effective, organizations continue to encounter operational challenges related to record organization, information security, database management, claims monitoring, and customer information integration.

RECOMMENDATIONS

Based on the findings and conclusions of the study, the following recommendations are proposed:

1. Insurance firms should continuously strengthen document classification and indexing procedures through standardization, automation, and periodic review of classification structures.
2. Organizations should modernize filing systems by integrating physical and electronic records management platforms to improve accessibility, efficiency, and information consistency.
3. Records storage and preservation practices should be enhanced through improved backup systems, disaster recovery mechanisms, cloud-based storage solutions, and digital preservation technologies.
4. Access and retrieval controls should be strengthened by implementing advanced authentication systems, access monitoring tools, and role-based security protocols.
5. Data privacy and security programs should be continuously updated to address emerging cybersecurity threats and maintain compliance with the Data Privacy Act of 2012.
6. Insurance firms should strengthen client database management systems by ensuring regular data validation, updating customer records, and integrating information across organizational units.
7. Policy renewal monitoring systems should be enhanced through automated reminders, customer engagement strategies, and predictive analytics to improve customer retention.
8. Claims and service ticket tracking systems should be improved by implementing real-time monitoring tools and transparent communication channels that provide customers with timely updates.
9. Organizations should establish comprehensive customer relationship management platforms that support unified client profiles and facilitate personalized service delivery.
10. Future researchers may replicate the study in other sectors such as banking, healthcare, education, logistics, and telecommunications to further validate the findings and expand the body of knowledge on records management and customer information systems.

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