Economics and Business
ISSN 2256-0394 (online)
2026, *40*, 125–139
https://doi.org/10.7250/eb-2026-0008
Published by RTU Press

INTEGRATING CUSTOMER EXPERIENCE MANAGEMENT AND CUSTOMER KNOWLEDGE MANAGEMENT FOR PERSONALIZATION: A CONCEPTUAL FRAMEWORK

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Received 16.10.2026; accepted 30.10.2026

Abstract. Personalization has become a central aim of customer experience strategies, yet many organizations find it difficult to sustain beyond individual offers and campaigns. This paper argues that an important reason lies in the separation of two management domains on which personalization depends: customer experience management (CEM), which designs and delivers the experience, and customer knowledge management (CKM), which acquires, shares, and applies customer knowledge. The study uses a conceptual research design based on an integrative review of literature on CEM, CKM and personalization, identified through database searches and citation tracing and interpreted through service-dominant logic and the knowledge-based view of the firm. Its result is a two-dimensional framework that maps three types of customer knowledge (knowledge about, from, and for customers) onto four stages of experience management: strategy and segmentation, experience design, experience delivery and personalization, and monitoring and continuous improvement. Each cell is linked to its supporting sources. The framework distinguishes points at which customer knowledge is applied to the experience from points at which the experience generates new knowledge, places AI and analytics as the mechanism connecting the two, and identifies five elements that serve both domains. It also proposes that the aging of customer knowledge and its continuity across touchpoints affect the experience directly, and states these relationships as propositions with indicators for empirical testing.

Keywords: *Conceptual framework, customer experience management (CEM), customer knowledge management (CKM), knowledge-based view, personalization, service-dominant logic.*

JEL Classification: D83, M15, M31

INTRODUCTION

Personalization, the tailoring of products, content and interactions to the individual customer, has moved from a distinguishing feature to an expectation. Organizations invest in data platforms, analytics and recommendation technology to meet it, and personalized touchpoints are now treated as a core element of the customer experience (Holmlund et al., 2020; Weidig et al., 2024). Many organizations nevertheless find that personalization remains confined to individual

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campaigns or channels and does not add up to an experience that is consistently personal across the customer lifecycle (Ameen et al., 2021).

Explanations for this gap are usually sought either in technology, where research examines artificial intelligence and recommender systems (Grewal et al., 2020; Hoyer et al., 2020), or in experience design, where it examines journeys and touchpoints (Lemon & Verhoef, 2016). Less attention has been paid to the fact that personalization is the joint outcome of two management domains. Customer experience management (CEM) determines what experience is designed and delivered (Homburg et al., 2017), while customer knowledge management (CKM) determines what the organization knows about its customers and how that knowledge moves through it (Gebert et al., 2003). Personalization is the point at which these two activities, knowing the customer and serving the customer, have to operate as one process.

The two fields have developed largely on separate tracks, and each rests on an assumption that narrows its view of personalization. CEM research tends to take the necessary customer knowledge as given: it maps journeys and measures experiences without specifying how that knowledge is obtained (Havíř, 2017; Jaakkola et al., 2022). CKM research tends to assume that better knowledge processes lead to better relationships, and studies them in relationship management or innovation settings without following knowledge into the experience (Durugbo & Pawar, 2014; Jokubauskienė & Vaitkienė, 2017). Customer experiential knowledge management (Jaziri, 2019) is among the few attempts to join the two, but it concentrates on one kind of knowledge. No existing model specifies which type of customer knowledge is needed at which stage of experience management.

This paper addresses that gap by developing a conceptual framework that integrates CEM and CKM for the purpose of personalization. Two questions guide the work: which types of customer knowledge are required at which stages of experience management, and which elements of the two domains overlap and therefore have to be managed jointly. The paper reviews both domains and compares existing integration attempts, describes how the framework was built, presents it with its supporting sources, and closes with propositions and indicators for empirical research.

1. THEORETICAL BACKGROUND

1.1. Customer Experience Management

Customer experience became an object of management when Pine and Gilmore (1999) argued that staged experiences could be a source of advantage and Schmitt (1999) placed customers' feelings, senses, and interactions at the center of brand value. Later work broadened the construct. Verhoef et al. (2009) showed that the experience is shaped by factors outside the firm's control as well as within it; De Keyser et al. (2015) defined it as the cumulative perception that results from a customer's cognitive, emotional, sensory, and social responses to a firm, and Lemon and Verhoef (2016) extended it across the whole customer journey. The field's origins in marketing, service management, design and organizational behavior have left it with fragmented definitions (Jaakkola et al., 2022), which Havíř (2017)

addressed by consolidating the dimensions used in conceptual and empirical studies.

Management-oriented work treats CEM as a capability. Homburg et al. (2017) describe it as a combination of cultural mindsets, strategic directions and renewal capabilities; its instruments include customer journey analysis (Halvorsrud et al., 2016) and listening mechanisms (Meyer & Schwager, 2007), and its delivery depends on coordination across marketing, sales, operations and service (Hoyer et al., 2020). Becker and Jaakkola (2020) add that CEM shapes the experiential context of the relationship rather than only managing customer data. In all of these accounts, however, knowledge is an implicit input. Each assumes that the firm knows enough about its customers to design and adjust their journeys, but none specifies which knowledge is needed, where it comes from, or how it reaches the point of interaction. This literature therefore supplies the process dimension of the framework while leaving its knowledge content open.

1.2. Personalization as a Management Task

Personalization is a principal means of differentiating experiences, and customers' expectations of it are set by leading digital services (Buhalis & Sinarta, 2019). Two streams of research dominate. A technology stream examines how artificial intelligence, analytics, and data platforms make tailoring possible at scale (Adke et al., 2023; Grewal et al., 2020; Haleem et al., 2022; Hoyer et al., 2020), with applications ranging from predictive offers (Gupta & Joshi, 2022) to banking (Bhattacharya & Sinha, 2022). A touchpoint stream examines how tailoring at individual touchpoints adds up to the overall experience (Weidig et al., 2024) and where it becomes intrusive (Ameen et al., 2021). Both streams locate the problem at the point of delivery.

A smaller body of evidence points further upstream. Holmlund et al. (2020) argue that customer data create value only when the organization can turn them into insight and action; Greiner and Goh (2021) find that personalized service depends on customer profiles being available across channels; Esteller-Cucala et al. (2020) show that experiments on personalized content produce knowledge that is easily misread; and Gazi et al. (2024) associate customer relationship management combined with knowledge management with satisfaction and loyalty. Read together, these findings suggest that personalization often fails before delivery, in how customer knowledge is obtained, kept current, and shared, which is the territory of CKM.

1.3. Customer Knowledge Management

CKM applies knowledge management (Davenport & Prusak, 1998) and the knowledge-based view of the firm, in which integrating specialized knowledge is the firm's distinctive role (Grant, 1996), to the customer relationship. Gebert et al. (2003) proposed knowledge-enabled customer relationship management, turning the one-directional flow of CRM into a two-directional exchange. Meyer and Kolbe (2005) review how such integration has been pursued, and empirical studies link CKM to loyalty (Karimi & Allameh, 2016) and organizational performance (Zand et al., 2018). The literature distinguishes knowledge about customers, which the

organization records and infers; knowledge from customers, which they contribute through feedback, complaints and co-creation; and knowledge for customers, which the organization returns so that they gain more value (Gebert et al., 2003; Salomann et al., 2005). Gibbert et al. (2002) describe how firms obtain knowledge from customers by treating them as partners; Prahalad and Ramaswamy (2004) see co-creation as a source of value; and Salomann et al. (2005) describe CKM as a cycle of acquisition, dissemination, and application.

Later studies widen the sources of customer knowledge to big data (Anshari et al., 2019), real-time co-creation in which customers also inform one another (Buhalis & Sinarta, 2019), engagement through feedback (Bolton et al., 2018; Pansari & Kumar, 2017) and open innovation (Jokubauskienė & Vaitkienė, 2017). The limitation mirrors that of the CEM literature. CKM models describe how knowledge is acquired and circulated but treat its use as a generic application step; the co-creation model of Durugbo and Pawar (2014), for example, treats knowledge exchange as a process in its own right rather than as part of the experience. CKM thus supplies the knowledge dimension of the framework but not the experience stages at which each type of knowledge matters.

1.4. The Basis for Integration

Service-dominant logic provides the bridge between the two domains. Lusch and Vargo (2014) treat knowledge as the fundamental operant resource and value as co-created, so that every interaction both draws on knowledge and produces it. Integration also has an organizational precondition: a customer-oriented culture (Lamberti, 2013; Lostakova & Stejskalova, 2015) that, through employee engagement and leadership, encourages functions to share what they know about customers (Colleoni et al., 2021).

Table 1 compares the approaches that come closest to joining CEM and CKM. Each connects part of the two domains, but none crosses all three knowledge types with the stages of experience management. Customer experiential knowledge management (Jaziri, 2019) comes the closest: it integrates the experiential knowledge customers accumulate online and offline into knowledge management, but it does not distinguish knowledge for customers or locate knowledge at particular stages of experience management.

The review thus yields three building blocks: a process dimension from CEM, a knowledge dimension from CKM, and a mechanism, the co-creation logic of service-dominant logic, that explains why the two should meet at every interaction. The next section describes how they were combined.

Table 1. Existing Approaches to Linking Customer Experience and Customer Knowledge (Created by the Authors)

Approach	**Core idea**	**Limitation for personalization**	**Addressed in this framework**
Knowledge-enabled CRM (Gebert et al., 2003)	Integrates CRM processes with knowledge management; two-way knowledge flow	Process view of CRM; experience design and delivery not addressed	Places the three knowledge types in each CEM stage
Styles of CKM (Gibbert et al., 2002)	Firms obtain knowledge from customers by treating them as partners	Centered on knowledge from customers, mainly for innovation	Covers all three knowledge types across the lifecycle
Knowledge for, from and about customers (Salomann et al., 2005)	CKM as a cycle of acquisition, dissemination and application	Knowledge types not linked to experience stages	Links each type to stage-specific practices
CEM as a capability (Homburg et al., 2017)	Cultural mindsets, strategic directions and renewal capabilities	Knowledge inputs left implicit	Specifies the knowledge each stage requires
Big data CEM framework (Holmlund et al., 2020)	Customer data turned into insight and action	Centered on knowledge about customers	Adds knowledge from and for customers and the return flow
Customer experiential knowledge management (Jaziri, 2019)	Integrates customers' online and offline experiential knowledge into knowledge management	One knowledge type; no stage structure	Three types across four stages; application and generation points; shared elements

2. METHODS AND PROCEDURES

The study follows a conceptual research design of the theory synthesis and typology kind (Jaakkola, 2020); it combines established concepts from two literatures into a framework that can later be examined empirically. The underlying review was integrative (Snyder, 2019), an approach suited to literatures that are spread across disciplines and to aims that are conceptual rather than the aggregation of effects. Service-dominant logic and the knowledge-based view served as the interpretive lens.

The sources were identified within a broader research project on the implementation of personalized customer experience, in which several hundred publications were screened. Searches were run in Scopus, Web of Science, ScienceDirect and EBSCO, combining terms for experience management (customer experience management, customer experience, customer journey) with terms for customer knowledge (customer knowledge management, customer

knowledge, knowledge-enabled CRM) and for personalization (personalization, personalized service, customization). Database searches concentrated on the preceding five to seven years in order to capture current practice, while foundational works on CEM, CKM and the two theoretical lenses were identified by tracing citations backward from the retrieved studies, regardless of their publication date. Peer-reviewed articles, conference papers and scholarly books in English were included if they conceptualized CEM processes or stages, defined customer knowledge types or CKM processes, or examined organizational conditions for personalization. Studies concerned only with algorithms or system architecture, and studies using experience in a sense other than the customer's, were excluded. The 43 substantive sources cited in this paper are those retained for the framework.

The framework was built in three steps. First, the process descriptions in the CEM literature (Halvorsrud et al., 2016; Homburg et al., 2017; Lemon & Verhoef, 2016; Meyer & Schwager, 2007) were consolidated into four stages: strategy and segmentation; experience design, covering journeys and touchpoints; experience delivery and personalization; and monitoring and continuous improvement. Second, the knowledge dimension adopted the established distinction between knowledge about, from and for customers (Gebert et al., 2003; Salomann et al., 2005). Third, each source was read for statements about which customer knowledge is used or produced in a given experience activity, and each statement was assigned to the stage and knowledge type it concerned. Similar statements within a cell were merged into one entry.

Three criteria governed the result. Coverage required every stage to be populated for every knowledge type, so that no cell remained empty. Parsimony limited each cell to three entries and removed entries that repeated across cells. Traceability required each cell to be supported by at least one source, which is cited in the cell (Table 2). The completed matrix was then analyzed in two ways: each entry was classified by direction, as a point at which knowledge is applied to the experience or one at which the experience generates knowledge, and practices described in both literatures and performing a distinct function in each were identified as shared elements. The stages and knowledge types are therefore taken from the literature, whereas the cell contents, the classification of integration points, and the shared elements are the authors' synthesis.

3. RESULTS

3.1. A Two-Dimensional CEM–CKM Integration Framework

The framework is presented in Table 2. Its rows are the four stages of experience management and its columns the three types of customer knowledge. Read along a row, it shows what a stage requires from each type of knowledge; read down a column, it shows how one type of knowledge travels through the experience lifecycle. Onboarding appears in the strategy row rather than under delivery because strategy decides which onboarding path and which explanation of value each segment receives; the onboarding itself is then delivered in stage 3.

Table 2. CEM–CKM Integration Framework for Personalization (Created by the Authors)

CEM stage	Knowledge about customers	Knowledge from customers	Knowledge for customers
1. Strategy and segmentation	Demographics, value tiers and customer lifetime value; channel preferences; needs-based clusters (Gebert et al., 2003; Holmlund et al., 2020)	Voice-of-the-customer interviews; accounts of pain points; joint ideation on value propositions (Gibbert et al., 2002; Prahalad & Ramaswamy, 2004)	Onboarding paths defined per segment; information that sets expectations; comparative explanations of value (Salomann et al., 2005)
2. Experience design	Persona attributes for journey mapping; historical interaction data (Halvorsrud et al., 2016; Lemon & Verhoef, 2016)	Co-creation workshops and usability tests; feedback on proposed journeys (Durugbo & Pawar, 2014; Prahalad & Ramaswamy, 2004)	Walkthroughs of new journeys; how-to guidance; explanations of experience options (Weidig et al., 2024)
3. Experience delivery and personalization	Real-time behavioral signals; predictive scores for offers; real-time identification (Adke et al., 2023; Gupta & Joshi, 2022)	Comments and feedback on social media that prompt a review of journeys (Buhalis & Sinarta, 2019)	Dynamic content and offers; proactive contextual help; knowledge articles shown within the journey (Hoyer et al., 2020)
4. Monitoring and continuous improvement	Segment-level indicators (NPS, CES, churn, customer lifetime value); funnel drop-off analysis (Esteller-Cucala et al., 2020; Holmlund et al., 2020)	Post-interaction surveys; complaint records; community discussions (Meyer & Schwager, 2007; Pansari & Kumar, 2017)	Proactive status updates; personal progress dashboards; notes explaining what was changed (Bolton et al., 2018)

Note: NPS – Net Promoter Score; CES – Customer Effort Score. Stages and knowledge types are taken from the literature; cell entries are the authors' synthesis of the sources cited in each cell.

Knowledge about customers is the principal input to experience design and personalization. Segmentation, persona development, and journey mapping all depend on it: knowing that one group of customers is digitally confident and another is not leads to different journey designs, and knowing that an individual prefers self-service allows the experience to be routed accordingly (Greiner & Goh, 2021). Personalization engines that select content or offers operate directly on customer profiles.

Knowledge from customers keeps the experience current. Experiences that are designed once and left unchanged lose relevance as expectations shift, and feedback, complaints, and co-creation are the means by which they are revised. When customers of a telecommunications operator repeatedly report that a self-service portal is difficult to use, that knowledge is the trigger for redesigning the

relevant part of the journey, ideally with those customers testing the new design. Customers also value seeing their contributions acted upon (Bolton et al., 2018).

Knowledge for customers is embedded in the delivery of the experience. Size guides in an online store, benchmark reports tailored to a business client's use of a service, and maintenance guidance in a vehicle owner's portal are all knowledge passed to the customer at the moment it is useful. Providing it requires internal knowledge, such as the content held by a service department, to reach customer-facing channels such as self-service pages and chatbots. When this column is neglected, customers receive generic information even when the organization holds knowledge that would make it personal.

3.2. Integration Points and the Knowledge–Experience Cycle

The classification by direction shows that CEM and CKM meet at two kinds of integration points. At application points, knowledge is used to shape the experience, as when a profile determines which offer a customer sees. At generation points, the experience produces new knowledge, as when a customer's response to that offer is recorded, or the customer explains why it was not relevant. Most interactions contain both, so the relationship between the domains is cyclical rather than sequential (Fig. 1).

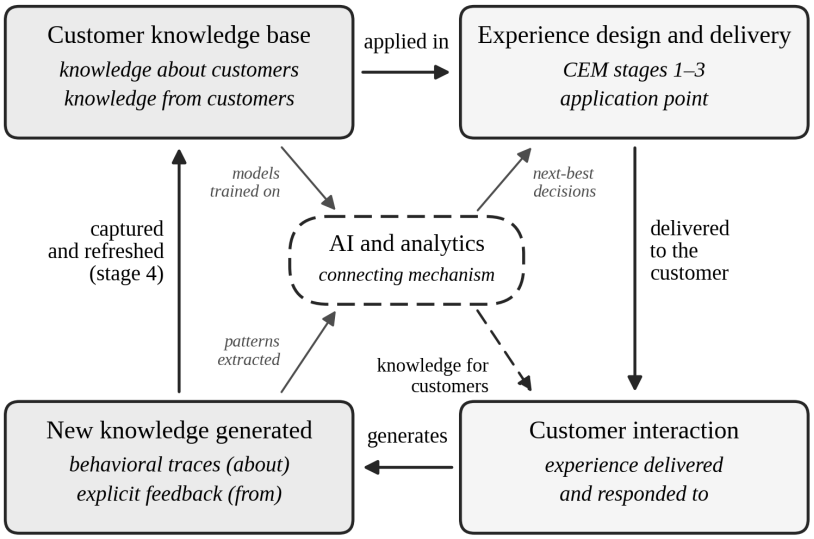


Fig. 1. The knowledge–experience cycle linking CEM and CKM (created by the authors).

In the cycle, knowledge about and from customers is applied in designing and delivering the experience. Each interaction then generates behavioral traces, which add to knowledge about customers, and explicit responses such as feedback or ratings, which add to knowledge from customers. This knowledge enters the knowledge base; part of it is returned to the customer as knowledge for customers,

and the next interaction begins from a richer basis. The cycle corresponds to the co-creation logic of service-dominant logic, in which the organization and the customer learn from each other (Lusch & Vargo, 2014).

AI and analytics sit at the center of the cycle as its connecting mechanism (Fig. 1). Models trained on the knowledge base inform next-best decisions at the application point, pattern extraction turns behavioral traces and feedback into usable knowledge at the generation point, and chatbots and contextual help increasingly deliver knowledge for customers directly (Grewal et al., 2020; Hoyer et al., 2020). The framework also indicates the conditions under which they do so effectively: algorithms depend on the quality of the knowledge they are trained on and benefit from human knowledge in refining them, which is a CKM concern, while the experiences they produce must remain oriented to the customer rather than to the logic of the system, which is a CEM concern.

3.3. Elements Shared by Both Domains

Five practices are described in both literatures and perform a distinct function in each. Because each serves both domains, none can be designed or owned by either domain alone.

- *Customer understanding.* Personas and journey analysis in CEM (Halvorsrud et al., 2016) and knowledge about customers in CKM (Gebert et al., 2003) are the same foundation viewed from two directions, one experiential and one informational.
- *Feedback loops.* Listening mechanisms improve the experience (Meyer & Schwager, 2007) while also feeding the knowledge base (Salomann et al., 2005), and controlled tests of personalized content produce knowledge about which approaches work (Esteller-Cucala et al., 2020).
- *Personalized delivery.* Real-time recommendations, dynamic content, and adaptive service scripts are points at which experience delivery is directly driven by customer knowledge (Adke et al., 2023; Gazi et al., 2024).
- *Front-line employees as knowledge brokers.* Staff who serve customers need access to profiles and histories, and what they learn in each interaction must, in turn, be captured as knowledge (Bhattacharya & Sinha, 2022).
- *A culture that values both personalized service and knowledge sharing.* Customer orientation is needed for CEM (Lamberti, 2013; Lostakova & Stejskalova, 2015), and the same orientation must encourage employees to share what they know about customers across departments for CKM to function (Colleoni et al., 2021).

3.4. Knowledge Quality and Continuity: Propositions

The framework suggests, but does not demonstrate, that two properties of customer knowledge shape the experience directly. Customer knowledge ages as preferences and circumstances change, and personalization based on outdated knowledge produces offers that no longer fit, which customers may attribute to the

organization rather than to its data. Knowledge gathered at one touchpoint, such as browsing behavior, is also of limited use if it does not reach the next, such as a contact center agent speaking to the same customer an hour later. Real-time data architectures make such continuity technically feasible (Gazi et al., 2024; Haleem et al., 2022), but the framework treats it as a property of the cycle as a whole. These relationships are stated as propositions for empirical testing.

- Proposition 1. The older the customer knowledge on which personalization is based, the lower the fit that customers perceive in personalized offers and messages.
- Proposition 2. Personalization is perceived as more consistent, and requires less customer effort, when knowledge captured at one touchpoint is available at the next.
- Proposition 3. Organizations that use knowledge from and for customers at all four stages, and not only knowledge about customers, achieve personalization that extends beyond individual offers.

4. DISCUSSION

4.1. Theoretical Implications

The framework makes three contributions to theory. First, it gives operational content to the claim of service-dominant logic that knowledge is the fundamental operant resource (Lusch & Vargo, 2014) by specifying which type of customer knowledge enters at which stage of experience management. Second, unlike the approaches compared in Table 1, it crosses all three knowledge types with the full experience management cycle; it extends customer experiential knowledge management (Jaziri, 2019) from one type of knowledge to three and from encounters to stages, and it adds knowledge for customers, which CEM models largely omit. Third, it reframes personalization capability in terms of the knowledge-based view. If the distinctive role of the firm is to integrate knowledge (Grant, 1996), personalization capability lies less in the volume of customer data held than in how that knowledge is integrated into the processes that design and deliver experiences. For personalization research, this moves attention from the point of delivery, where the technology and touchpoint streams place it, to the upstream conditions that determine what delivery can draw on. These contributions rest on the synthesis; the effects stated in Subsection 3.4 remain propositions.

4.2. Managerial Implications

The framework is proposed as a design reference rather than a tested tool. When a journey is created or revised, its cells prompt three questions for each stage: what the organization needs to know about the customer, what it should learn from the customer, and what it should give back. Efforts that address only the first question are likely to remain confined to offers. The shared elements imply joint responsibility, for example between service designers and knowledge managers when support content is brought into a digital journey.

A retail bank illustrates how the framework could be applied. At the strategy stage, the bank segments new customers by life stage and decides that young professionals receive a mobile-first onboarding path. At the design stage, a group of such customers tests a redesigned loan application journey. At delivery, behavioral signals on the mortgage calculator trigger contextual guidance and, where appropriate, a call from an advisor who can see the customer's recent digital activity. At the monitoring stage, complaints reveal that offers rely on outdated income data, which prompts a refresh of that part of the profile and a note to affected customers explaining the change. Each step draws on a different cell of Table 2, and the gaps a bank finds when tracing a journey in this way show where its knowledge and experience processes are not yet connected.

4.3. Limitations and Future Research

The framework is conceptual and has not been tested empirically. Its cells were populated from literature that concentrates on digital and business-to-consumer settings, and the review was integrative rather than exhaustive, so relevant sources may have been missed, and applicability to other contexts should not be assumed. Testing the propositions requires indicators for both sides of the framework. Customer knowledge integration could be measured by the age of key profile attributes, the share of touchpoints at which the current profile is available, the share of captured feedback acted upon within a set period, and the number of journey stages with defined knowledge inputs. Personalization effectiveness could be measured by recommendation acceptance, uplift against a non-personalized control group, customer effort scores, and repeat purchase. Three research directions follow: cross-industry studies to establish whether factors such as regulation and product complexity change the relative importance of the knowledge types (Pansari & Kumar, 2017); longitudinal studies linking integration to loyalty and customer lifetime value; and studies of how AI changes the division of work between the two domains.

CONCLUSIONS

Personalization depends on two capabilities that organizations often manage separately: managing the customer experience and managing customer knowledge. This paper has proposed a framework that maps three types of customer knowledge onto four stages of experience management, distinguishes application from generation points, places AI and analytics as the mechanism linking them, and identifies five elements that require joint management. Its contribution is a structured, source-linked synthesis. The effects of knowledge quality and continuity on the experience are stated as propositions, and testing them with the indicators suggested above is the necessary next step.

ACKNOWLEDGMENT

The first author's doctoral studies at Riga Technical University served as the basis for this paper. It has never before been published in a journal.

Generative AI tools were used in preparing this manuscript under the authors' supervision. Claude (Anthropic) was used for language editing, technical and formatting checks, checking in-text citations against the reference list, to a limited extent in the literature search, and to help shorten the text in Fig. 1. SciSpace was used for language editing, to a limited extent in the literature synthesis, and to check that no relevant studies were missed in the discussion of the results. The research question, design, conceptual framework, analysis, and conclusions are the authors' own, and no data or findings were generated by AI. The authors reviewed and edited all AI-assisted output, verified all sources, and take full responsibility for the content.

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