

**MARK 567**  
**CUSTOMER RELATIONSHIP MANAGEMENT**  
**Winter 2017/2018**  
**6:00pm-9:00pm Wednesdays- Corboy Law Center Room 209**

**INSTRUCTOR:** Paul Petricca  
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Office Hours: Wednesdays 3pm to 5pm or by appointment

**COURSE DESCRIPTION:** A highly interactive discussion of Customer Relationship Management concepts and strategies, along with a unique Salesforce.com simulation.

**REQUIRED MATERIALS:**

- **Textbook:** No textbook required
- **Salesforce.com Simulation:** Ebooks will be provided to each student
- **Case Studies:** To be provided by instructor

**COURSE OBJECTIVES:**

- Introduce students to the concepts of customer relationship management, including the lifetime value of a customer, customer life cycle analysis, prospect and customer database management, and interpersonal CRM strategies and techniques.
- Understand the roles of sales and marketing professionals in today's customer relationship management environment.
- Learn how customer relationship professionals deal with legal, ethical, and social responsibility issues.
- Practice using customer relationship management techniques through class discussions, case studies, and role plays.
- Gain an understanding of customer relationship management systems through a unique hands-on Salesforce.com computer simulation.
- Analyze and critique the customer relationship strategies of U.S. and International corporations.

## “Real World” Evaluation

In the business world, employees are typically evaluated and compensated based on individual, group, and company performance. Your grade will represent my evaluation of your contributions and achievements as both an individual and as a member of a team. In making this evaluation, I will use the following grading scale:

<u>Course Grading Scale Weights</u>	<u>Loyola University Grading Scale</u>
A 100-93%	A 4.00
A- 92-90%	A- 3.67
B+ 89-87%	B+ 3.33
B 86-83%	B 3.00
B- 82-80%	B- 2.67
C+ 79-77%	C+ 2.33
C 76-73%	C 2.00
C- 72-70%	C- 1.67
D+ 69-67%	D+ 1.33
D 66-60%	D 1.00
F 59 and below	F 0.00

The following are the grading categories:

- **Team Interaction and Class Participation (25%)**
- **Individual Written Report (25%)**
- **Weekly clipping submission and presentation (25%)**
- **Group Case Study Presentation (25%)**
  - Group Presentation (15%)
  - Individual contribution (10%)

## INSTRUCTOR POLICIES

- To minimize distractions and encourage class participation, laptops and phones must be turned off during class, with the exception of the Salesforce.com simulation.
- I reserve the right to deviate from the course outline and make changes to the course syllabus to enhance the effectiveness of class conversations and projects.

## **WEEKLY TEAM INTERACTION AND CLASS PARTICIPATION**

The key to success in this class is simple....come to class and participate! My job is to make sure the presentation of the course concepts is in a “conversational” format that is interesting and fun. All YOU need to do is come to class prepared to join the conversation. I assure you that we will all benefit from your thoughts and ideas.

The material we will cover is not overly complicated, but lends itself to interactive learning through lecture discussions, small group projects, and role play activities.

I have designed a flexible format for each class, because if we hit a topic that produces a lively conversation, I want to make sure we complete that conversation to our collective satisfaction. This will foster a deeper conversation to reinforce the key concepts you are introduced to.

Obviously, regular class attendance, punctuality, and staying for the entire class are necessary to make a positive class contribution. Thus, unexcused absences or the failure to be punctual will affect your grade. Absences are excused at my discretion, and absences will be excused for participation in official College events, job interviews, and serious illnesses.

You are responsible for arranging an excused absence in advance or during your illness. For all absences, whether excused or unexcused, you are responsible for handing in assignments on time, unless other arrangements have been made in advance. Students may be docked one letter grade (i.e. 4.0 to 3.67) for each unexcused absence.

Please communicate absences to me by email as soon as possible.

## WEEKLY CLIPPINGS

As part of our weekly conversation, you will be responsible for bringing to class a hard copy of an article from a newspaper, magazine, blog, website, or any other social media site **that pertains to the topic scheduled for that class (see the schedule of topics below)**. Let's call this your "weekly clipping". You should be prepared to describe and review the relevancy of your weekly clipping with the class.

Like the "real world", there is always some level of subjectivity with performance reviews. For the Weekly Clipping grade, I will take into consideration the following:

- The quality of the description of your clipping and why it is relevant to the discussion (notes on the clipping). I read them all!
- The number of scheduled Weekly Clippings you turn in during the semester.
- The professional presentation of your clipping. Each week several students will be asked to present their clipping. All students will have the opportunity to present at least one time during the quarter.
- Your overall interest and participation in Weekly Clipping discussions.

### Weekly Clipping Schedule and Topic

November 8th	No clippings
November 15th	Understanding customers
November 22nd	No clippings—Thanksgiving Break
November 29th	How companies build customer trust
December 6th	CRM adoption challenges
December 13th	No clippings (Individual Presentations)
<b>Winter Break</b>	
January 17th	Customer appreciation strategies
January 24th	Impact of service on customer relations
January 31st	Creating a partnership with customers
February 7th	Ethics in customer relationship management
February 14th	No clippings (CRM Group Presentations)

## **INDIVIDUAL WRITTEN REPORT**

Each student will analyze the Lifetime Value (“LTV”) of a Customer for a company of their choosing. Students will be asked to describe the LTV philosophy of the company and provide a commentary, including how LTV is measured and recommendations for improvement.

Each student will prepare a written report to be submitted on **December 6<sup>th</sup>**. The reports should be no more than two pages in length (single-spaced in size 12 font). Students who would like extra credit will have the opportunity to present their report during class on **December 13<sup>th</sup>**.

## **SALESFORCE.COM SIMULATION**

As a complement to the theoretical customer relationship management topics we will be covering, the class will have a hands-on opportunity to use an online productivity tool through the Salesforce.com platform. Students will learn how to manage client relationships by tracking contacts, accounts, leads, opportunities, and activities. **Students should bring their laptops to class each week for the simulation.**

## **GROUP CUSTOMER RELATIONSHIP PLAN PRESENTATIONS**

In your job, you will periodically be asked to take on a project that can have a real impact on an organization. These projects require critical thinking and innovation and are often in a group setting.

I will select the teams for this presentation. Your group will be asked to design and present a Customer Relationship Plan for a company on **February 14<sup>th</sup>**. Each group will be able to select their own company.

Here are some of the details for this presentation:

- The actual presentation will be no more than 20 minutes
- A 5 minute question and answer period will follow each presentation
- **All** group members are required to have a speaking role
- Supplemental materials or illustrations are encouraged
- Groups are **STRONGLY** encouraged to be creative.

Each student will be responsible for attending team meetings outside of class, contributing to the preparation of the team’s critical analysis, and participating in the development and delivery of the team’s presentation.

The overall group presentation format and style will be evaluated, as part of the overall grade for this project. In addition, each student's individual presentation and contributions to the team will be graded.

### **ACADEMIC INTEGRITY:**

All members of the Quinlan School shall refrain from academic dishonesty and misconduct in all forms, including plagiarism, cheating, misrepresentation, fabrication, and falsehood. Plagiarism or cheating on the part of the student in individual or group academic work or in examination behavior will result minimally in the instructor assigning the grade of "F" for the assignment or examination. In addition, all instances of academic dishonesty must be reported to the chairperson of the department involved.

For further information about expectations for academic integrity and sanctions for violations, consult the complete Quinlan School of Business Honor Code and Statement of Academic Integrity on the Quinlan website:

<http://www.luc.edu/media/lucedu/quinlanschoolofbusiness/pdfs/Honor-Code-Quinlan-July2012.pdf>

### **CLASS SCHEDULE**

November 8th	Opening Night Festivities
November 15th	Understanding Customers
November 22nd	<b>No Class—Thanksgiving Break</b>
November 29th	Building Trust
December 6th	Customer Communication Skills
December 13th	<b>Individual Presentations</b>

### **Winter Break**

January 17th	Creating Value Propositions
January 24th	Communicating Value
January 31st	Addressing Customer Resistance/Earning Commitment
February 7th	Expanding Customer Relationships
February 14th	<b>Group CRM Presentations</b>