

York University
Faculty of Liberal Arts and Professional Studies
Administrative Studies
Winter, 2020

COURSE

AP/ADMS 4255 3.00 Section M -- Customer Relationship Management (CRM)
Thursdays 11:30 am to 2:30 pm; Lecture theatre: ACE 005

An examination of principles, methods, and strategies for building collaborative buyer-seller relationships that create competitive advantage for the firm by identifying, differentiating, and interacting with profitable customers and customizing product/service offerings for them.

PRE-REQUISITES

The following are the pre-requisites for this course. Students, including exchange students, should ensure that they have the appropriate pre-requisites as the University may de-enroll any students without the appropriate pre-requisites:

Prerequisites: 1) For students in an Honours program, 72 credits including AP/ADMS 2200 3.00, or 2) for other students, a grade of C+ or better in AP/ADMS 2200 3.00. Course credit exclusions: None.

COURSE INSTRUCTOR / CONTACT

Course Instructor: Prof. Ian Gordon

E-mail: igordonyork@aol.com

Office hours: By appointment, by emailing the instructor. The hour preceding class, or after class, is available, as are other times, by mutual agreement.

COURSE LEARNING OBJECTIVES

The objectives of this course are to provide the student with:

1. A strategic marketing framework for understanding customer relationship issues and their impact on organizations, including the following:
 - The changing nature of the Canadian marketplace
 - Customer relationships and the linkage to customer satisfaction, customer loyalty, brand equity and financial performance
 - Identifying and differentiating customers
 - Mass customization of customer interactions and products and services
2. Operations and implementation considerations exploring practical issues in CRM, such as the following:
 - Data issues, including mining, prediction, management and presentation
 - Customer identification, in-bound and out-bound communications, and customization
 - New skills, roles and structures for a company's marketing department
 - CRM technology options and issues
 - Best practices in CRM
3. Experience in applying the concepts of CRM in a practical context, analytical thinking, presentations skills, and team work

EXPANDED COURSE DESCRIPTION

Technology has transformed marketing by enabling entirely new ways of conceiving a relationship with customers, and allowing economical access, communications and transactions with individual customers. Two of the strategic marketing impacts of price-performance advances in technology are:

- The ability of companies to treat individual customers as though they are markets – markets of one, and
- An opportunity for companies to manage customers' behaviours and relationships using technology to complement traditional marketing methods that tend to focus on customers' perceptions and attitudes.

This course is about the strategic and marketing principles that enable companies to develop closer relationships with their consumers and business customers, and how companies can plan and apply these principles to achieve business objectives.

Today, Customer Relationship Management (CRM) is a term often closely linked to technology implementations of marketing and customer applications. This course will consider technology but this is *not* a course exclusively about CRM technology. We will treat the issue of customer relationships from a marketing point of view and will apply marketing and strategic concepts to focus on customer relationships more broadly than technology alone.

However, technological advances are creating new possibilities for creating and sustaining profitable customer relationships and many of these arenas will be considered in this course, including mobile platforms, data mining and predictive analytics, and social media.

ORGANIZATION OF THE COURSE

This course will employ theory, casework and secondary research, and will provide an opportunity for students to apply their knowledge in a real world client context. Four components of work will be graded, as follows:

- Some cases need to be handed in as individual assignments – see the date when you need to hand in a case based on the first letter of your last name. All individual submissions must be academically honest and be the work of the student alone.
- Students will work together in teams on a term project to prepare a customer relationship management plan for a client organization. The team (or some among its members) will present their plan to the client on the last class before the final examination. This work will be time intensive. Students should work consistently on the project throughout the semester, not just towards the end.

In addition, there will be a mid-term examination and a final examination. The mid-term will place much emphasis on definitions and core concepts while the final examination will pay more attention to students' understanding and application of the main concepts in the course.

There will be considerable reading required for this course. Students should keep up to date from the beginning of the semester, or may not easily catch up. Designated readings should be reviewed prior to attending class.

REQUIRED COURSE TEXT / READINGS

Two books are required for this course, as follows:

- *Managing Customer Experience and Relationships: A Strategic Framework, 3rd Edition*, Don Peppers and Martha Rogers: John Wiley & Sons. (The first edition of the Peppers and Rogers text is not to be used for this course. The second edition is also not encouraged).
- *Managing the New Customer Relationship - Strategies to Engage the Social Customer and Build Lasting Value*, Ian Gordon, John Wiley & Sons, ISBN 978-1-1180-9221-7. Publication date: April, 2013. This text is available without charge as an online e-resource.

Students will also need to purchase and download cases and readings from the Harvard Case Publishing website directly. A coursepack has been prepared for students to obtain all the required readings and cases from Harvard Case Publishing.

Use this link for the coursepack: <https://hbsp.harvard.edu/import/670335>

The readings and cases are assigned to specific classes and are to be reviewed before class.

For additional reading and to supplement the texts – mostly for student interest and to provide additional content for selected assignments, a Bibliography has been provided at the end of this Course Outline.

WEIGHTING OF COURSE

The makeup of the final course grade will be as follows:

Mid-term examination	15%
Final examination	15%
Individual analysis and hand-in of a case (max. 10 pages for case)	15%
Group project: research, analysis, CRM plan development and presentation	40%
Class participation	15%
Total	100%

ADDITIONAL INFORMATION / NOTES

CLASS PARTICIPATION

Grades will be assigned for class participation. Write down details of your class participation using a participation log that will be provided to you. Hand in these log sheets in hard copy at the end of each class so that your contribution to class can be duly noted. These sheets will help inform your participation grade as will the online peer review survey (discussed in section “Note on Team Grades”). Class participation is based principally on the quality and quantity of contributions in class and also to the team projects. Quality - demonstrating academic thoughtfulness, insight and practical application - is more important than the frequency of contribution.

For this class to achieve the level of interaction and insight possible, and for student participation to be gauged, it is essential that students are present at each class. Discussion exercises are assigned and discussions will be held on team assessments each evening. This will be an important component of the class participation mark. Those unable to attend should submit a written, 2-page submission of the subject matter scheduled for discussion that evening. (Submissions are not required if a student misses the first week of class but are required for other missed classes. The 2-page submission is due the week after the missed class).

Students may not miss more than two classes in the semester without professional medical or equivalent documentation to support reasons for absence.

On nights when cases are discussed, individual students may be asked their views in respect of specific topics. Responses will be considered as part of the class participation grade.

NOTE ON CASES (INDIVIDUAL)

Write up cases using the following format:

- Situation Analysis (background to the issue)
- Objectives (Statement of issue to be addressed)
- Options to Address Objectives (list all options the company could undertake, including status quo – do nothing)
- Evaluation of Options (provide detailed evaluation, calculations, qualitative assessment, etc, for each option. Use appendices as needed)
- Recommendations for Company (state clearly what the company should do and why)

Write cases double-spaced, with Arial 12 point font and 1 inch margins. Case submissions should not exceed 10 pages in length, excluding the cover page, Table of Contents and appendices. Include all references to secondary sources using good formatting with footnotes for every source that is not from you or your team. Spelling and grammar count towards your grade. Use charts, tables and graphs where appropriate. You can use bullets as appropriate (as I have done above!)

Note that all cases should be analyzed using only case material itself. That is, stay within the case. Students are not expected to use external research to supplement case material as this is not an exercise in research but rather one that explores students' approach to analysis and critical thinking.

When you have completed your case, submit via the link provided on Moodle. Note the date and time by when the submission must be made. No late submissions are accepted. **CASES MUST BE SUBMITTED BEFORE THE START OF CLASS** as the cases will be discussed during class.

Note that Turnitin (via Moodle) and the instructor check for plagiarism; any evidence of plagiarism is regarded as the serious offence it is and is treated accordingly.

TERM PROJECT TO BE CONDUCTED BY GROUPS

The term project for this course involves the development of a CRM plan for a client organization. There will be interim deliverables as well as a final client presentation and submission of a report to the client. The sequence of activities will be as follows:

- Prior to Week 3: Team formation. Team members review content posted in Moodle about client organization and project deliverables. Each team submits questions to instructor that will be asked of client presenting in Week 3. See Course Outline for submission schedule.
- Week 3: Client presents to class. Students engage with client and ask any questions they wish to advance their term project. Students should make sure they receive sufficient information to complete the deliverables that follow.
- Week 6: Students prepare and submit an assessment of the client and its markets. This submission is due 1 hour before the start of the Week 6 class. See Course Outline detail for specific dates. Submit this deliverable through Moodle using the appropriate link for Deliverable 1. Only one person in each group should submit the report. This deliverable is worth 30% of the term project.

The following is to be the structure for this deliverable. Use this format – do not deviate from this format as a rubric will be used to mark each component. The

submission should not exceed 15 pages in length excluding the cover page, Table of Contents and Appendices. The report should be double spaced with one inch margins all round (top, bottom, both sides). Use Arial 12 point font for the report.

DELIVERABLE 1: MARKET ASSESSMENT (10 pages including cover page, excluding appendices).

COVER PAGE (List all team members in order - alphabetically by last name, and student numbers)

TABLE OF CONTENTS

OBJECTIVE (What is the overall objective of the project and what is the objective of this work component?)

MARKET ASSESSMENT

1. Name of client (include head office address)
2. Goods and services (list and describe, note percentage of revenues and profits from each product [i.e. goods and services], describe growth rate in revenues for each product)
3. Target audience(s) (List and describe target demographics according to client)
4. Positioning (Provide a positioning statement based on information provided by client)
5. Pricing (Provide a price list for products that comprise a majority of the firm's sales – over 50%)
6. Markets (list and describe, note geographic markets served, revenue percentage by geographic market)
7. Customers (how many, percentage of total customers by each geographic market, average revenues per customer for each geographic market)
8. Customer profile (Profile each geographic market in detail using PRIZM data)
9. Competition (List and describe competition in detail for each geographic market using PRIZM database)
10. Competitive positioning (Conduct online research of web presence and Facebook/Instagram to under the likely target audience of key competitors, competitors' communicated message or tagline, and the likely positioning statement underlying the taglines/online communications)
11. Competitors' pricing (Provide pricing information as available for key products marketed by client)
12. Customer purchase process (Discuss and present graphically how customers progress from initial engagement to becoming advocates of the enterprise. Show various steps of progression and describe each step behaviourally – to be reviewed in class)

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Week 10:

Students prepare and submit an assessment of the client and its markets. This submission is due 1 hour before the start of the Week 10 class. See Course Outline detail for specific dates. Submit this deliverable through Moodle using the appropriate link for Deliverable 2. Only one person in each group should submit the report. This deliverable is worth 30% of the term project.

The following is to be the structure for this deliverable. Use this format – do not deviate from this format as a rubric will be used to mark each component. The submission should not exceed 15 pages in length excluding the cover page, Table of Contents and Appendices. The report should be double spaced with one inch margins all round (top, bottom, both sides). Use Arial 12 point font for the report.

DELIVERABLE 2 – CUSTOMER ANALYSIS

COVER PAGE (List students in group in order - alphabetically by last name, provide student numbers)

TABLE OF CONTENTS

OBJECTIVE (What is the overall objective of the project and what is the objective of this work component?)

CUSTOMER ANALYSIS

1. Customer database (describe the database – how many unique customers in database in total, percentage database represents of all customers, list categories of fields/cells/data captured, how recent, what time period of transactions)
2. Analytical process (Describe how the team acted on the database. What tools were used? What analysis was performed?)
3. Customer analysis by geography (Describe, for each geography (store), the percentage of customers that store represents of all customers for all stores/regions, the percentage of revenues that store represents of all stores/regions in database, the percentage of customers that account for each decile of revenues for each individual store (e.g. 10% of customers account for 23% of revenues in store 1, 20% account for 31%..., etc.), the percentage of revenue by product - by store, other analysis that can reasonably be performed from the customer database provided including any appropriate statistical analysis (to be discussed in class))
4. Customer triage (Triage customers into best, average, worst using only customer value for this purpose. Describe basis for triage [i.e. what criteria were used to define “best”, etc?])
5. Customer lifetime value (Assess the customer lifetime value for each customer in the database using 10 years and current revenues as the basis for analysis. What is the average CLV of a best customer, average customer and worst customer? Based on average product margins as provided by client, what is the estimated customer lifetime profitability for each category of customer (best, average, worst)?
6. Customer behaviours (Considering the purchase process from Deliverable 1, explore/analyze and describe – based on facts from database analysis - whether customers are indeed progressing towards advocacy as intended or are they “bottlenecked”? Provide a relationship ladder with behaviours at each rung of the ladder described and the percentage of customers at each level noted, ideally overall and by store if this can be provided)
7. Gaps (What shortcomings are there in the data you have received and on which you have worked? Is it recent? Is it complete? What would you like to have had provided to you in addition to that which you received?)
8. Conclusions (Consider is best customers are receiving best value, opportunities to create new customer value, examination of customers’ purchase behaviours and progression)

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Week 12:

Students prepare and submit a Customer Relationship Management Plan using the IDIC model that students will have learned in class. This submission is due 1 hour before the start of the Week 12 class. ALSO SUBMIT THE TEAM’S CLIENT PRESENTATION 1 hour before the start of class. Bring hard copy of the report and presentation for both the client and the course instructor, and soft copy using MS PowerPoint (ONLY POWERPOINT) on a USB memory stick to class. See Course Outline detail for specific dates when submission is to occur. Submit this deliverable through Moodle using the appropriate link for Deliverable 3 report and for Deliverable 3 presentation. Only one person in each group should submit the

report and one person the presentation. This deliverable (report and presentation together) is worth 40% of the term project mark.

The following is to be the structure for this deliverable. Use this format – do not deviate from this format as a rubric will be used to mark each component. The report and the presentation should have the same format but the presentation should obviously be suitable for, well, presentation – using the same content as provided long hand in the report. The client report should not exceed 15 pages in length excluding the cover page, Table of Contents and Appendices. The report should be double spaced with one inch margins all round (top, bottom, both sides). Use Arial 12 point font for the report. The presentation should not exceed 15 slides.

DELIVERABLE 3 – CUSTOMER RELATIONSHIP MANAGEMENT PLAN

COVER PAGE (List students in group in order - alphabetically by last name, provide student numbers)

TABLE OF CONTENTS

1. Objective (what was the objective of the project?)
2. Method (what did the team do?)
3. Market summary (Summarize key aspects of the market analysis from Deliverable 1. Use no more than 2-3 pages for this summary)
4. Customer summary (Summarize key aspects of the customer analysis from Deliverable 2. Use no more than 2-3 pages for this summary. Pay particular attention to the “relationship ladder” that leads to customer advocacy. Situate the firm’s customers on this ladder)
5. The IDIC Model (Describe the IDIC Model as the client will need to understand this theory)
6. Identify (Discuss what you have learned about the client’s customers’ identity from your team’s prior work this semester)
7. Differentiate (Discuss the analysis performed on the firm’s customer base and how you have differentiated customers from one another)
8. Interact (Discuss options for the firm to adopt when it comes to interacting with individual customers. Pick a preferred option and defend it. Which customers and why these? What dialogue and content, and why this? What channels and why? What offers and why these? What tracking and what will be done with the data tracked?)
9. Customize (Discuss options for the firm to adopt when it comes to customizing products – either goods *or* services - with individual customers. Pick a preferred option and defend it. Which customers and why these? What dialogue and content, and why this? What channels and why? What offers and why these? What tracking and what will be done with the data tracked?)
10. Implementation (Summarize the key aspects of implementation and tracking of actions and results. Show timing and project costs for any aspects that do have a cost associated with them)

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NOTE ON TEAM GRADES

Grades will be assigned to teams as a whole. In certain situations, the grade may be adjusted where individuals fail to meet the expectations of the group - note that successful team work is part of the curriculum. You are expected to participate successfully in your group, and you have the responsibility to ensure to that your group works. If one team member does not work effectively or professionally, that may be as much the team’s issue as that of the individual. Approach teamwork respectfully and listen to one another. And if there is a problem that cannot be resolved by the team, approach the instructor quickly as a team before too much of the semester has elapsed.

Towards the end of the semester you will have an opportunity to rate other team members in peer reviews online and this may be used to adjust the individual's grade relative to the group, if indicated. Where a person has not lived up to the expectations of team members, the Course Director will assess the background to this and may adjust the grade for one or more members of the team to reflect the Course Director's assessment, at his sole discretion. [Team member assessment will also serve as an input to class participation grades].

All team members may not receive the same grade for a team project, so work hard to get along, achieve the project objectives and do what is expected of you – which is a lot like the business environment. More about this as we progress through the semester.

INDIVIDUAL WORK

York's policy applies and assumes that work submitted as that of an individual is original work of the individual student. Violation is grounds for prosecution under the rules of the University. More specifically, do not plagiarize, do not copy the paper of another student, do not use purchased or widely available papers or other content off the Internet or elsewhere without identifying what is not yours. Where no sources are mentioned, the work will be assumed to be yours. If this proves not to be the case, **very** severe repercussions will generally result.

NAME CARDS

Write your name on a tent card, bring this to all classes and put it on your desk at every class until the end of the term.

RECORDING CONTENT IN CLASS

Audio or video recording, or photography of any in-class activities is not permitted without written approval from the instructor.

DETAILED COURSE OUTLINE

	Date	Subject matter	Text readings *	Read article	Student submissions	Group discussion and/or case review – Cases in Coursepack from Harvard Case Publishing Services
1	Jan. 9	Introduction Structure of course Mutual expectations What is CRM? Who needs CRM? What do marketing managers and senior executives want to achieve from CRM? CRM definitions and key principles Opportunities and pitfalls for CRM	P&R : 1 G:1	<i>A Framework for CRM</i> , Russell S. Winer, HBR/California Management Review CMR209		None
2	Jan. 16	Customers and relationships Tomorrow's customers in Canada Customer loyalty and satisfaction Permission and privacy Contrasting relationships with business customers with consumer	P&R : 2 G: 2	<i>Preventing the Premature Death of Relationship Marketing</i> , Fournier, Dobscha, Mick, HBR <i>Avoid the Four Perils of CRM</i> , Rigby, Reichheld and Schefter, HBR R0202	Students to provide questions to instructor that will be asked of client next week. Questions to be submitted through Moodle. Due Jan 21 at 5:00 PM. Just one person from each team should submit.	<ul style="list-style-type: none"> • Assignment of individuals to groups for term project. Term project and related expectations explained. • Explanation of cases to be handed in for individuals. • <i>Class discussion of: Harrah's Entertainment,</i>

	Date	Subject matter	Text readings *	Read article	Student submissions	Group discussion and/or case review – Cases in Coursepack from Harvard Case Publishing Services
		relationships Relationships with other stakeholders including channel intermediaries Trust		98106		Rajiv Lal, Patricia Martone Carrolo HBS 9-502-011 <ul style="list-style-type: none"> Students are expected to have read and prepared this case. This is an important case as it was one of the first times a company revolutionized an industry based on CRM. Questions will be asked of individual students and responses will count towards class participation
3	Jan. 23	Planning relationships and communicating <u>Planning relationships</u> <u>IDIC Model</u> The Customer Relationship Cycle Practical issues in CRM planning Avoiding some of the mistakes companies make in CRM CRM CLIENT PRESENTS TO CLASS. STUDENTS ASK PREPARED QUESTIONS OF CLIENT.	P&R : 3, 4, 6 G: 3	<i>Is your company ready for One-to-One Marketing?</i> , Peppers, Rogers, Dorf, HBR 99107		<ul style="list-style-type: none"> <i>Class discussion of: Social Strategy at Nike</i>, Mikolaj Jan Piskorski, Ryan Johnson, Harvard Business School, Case #: 9-712-484, Product #: 712484-PDF-ENG Students are expected to have read and prepared this case. Questions will be asked of individual students and responses will count towards class participation
4	Jan. 30	Communicating with individual customers A 'learning relationship' Direct mail campaigns Multi-channel campaigns Privacy and permission Differentiating customers by need	P&R : 7, 9	<ul style="list-style-type: none"> <i>The Perfect Message at the Perfect Moment</i>, Kalyanam and Zweben, HBR R0511G <i>E-Loyalty: Your Secret Weapon on the Web</i>, Reichheld, HBR 5181 	<i>Privacy Issues and Monetizing Twitter</i> , Deborah Compeau, Nicole R.D. Haggerty, Shady Fraiha, Apr 15, 2011, Richard Ivey School of Business Foundation (available from HBS), Product number: W11037-PDF-ENG, Length: 17p <u>Case to be handed in by individuals for grading (for people whose last name begins A-F. Submit soft copy to Moodle)</u> CASE MUST BE SUBMITTED ONE HOUR BEFORE THE START OF CLASS – NO LATE SUBMISSIONS ACCEPTED	<ul style="list-style-type: none"> <i>Privacy Issues and Monetizing Twitter.</i> Discussion of case by class All students are expected to have read and prepared this case, not just students handing it in. Questions will be asked of individual students and responses will count towards class participation

	Date	Subject matter	Text readings *	Read article	Student submissions	Group discussion and/or case review – Cases in Coursepack from Harvard Case Publishing Services
5	Feb. 6	CRM metrics Differentiating by customer value Differentiating by customer influence Calculating the cost of CRM Lifetime Customer Value Share of customer Loyalty programs	P&R : 5, 11, 12	<i>CRM Done Right</i> , Rigby & Ledingham, HBR R0411H	<i>Hilton HHonors Worldwide: Loyalty Wars</i> , HBS 9-501-010 Case to be handed in <u>by individuals for grading (for people whose last name begins G-M. Submit soft copy to Moodle)</u> CASE MUST BE SUBMITTED TO MOODLE ONE HOUR BEFORE THE START OF CLASS – NO LATE SUBMISSIONS ACCEPTED	<ul style="list-style-type: none"> <i>Hilton HHonors Worldwide: Loyalty Wars</i>, HBS 9-501-010 Discussion of case by class. All students are expected to have read and prepared this case not just students <i>handing</i> it in. Questions will be asked of individual students and responses <i>will</i> count towards class participation
6	Feb. 13	Real time and mobile relationships Relationships with social and mobile customers Social media taxonomy and considerations Engaging the “always connected” customer	P&R : 12 G: 4, 6	<ul style="list-style-type: none"> <i>CRM: Profiting from understanding customer needs</i>, Stringfellow, Nie, Bowen HBS/Business Horizons Article – BH158 <i>Real-time Marketing</i>, Regis McKenna, HBR 95407 	<i>Angels and Devils: Best Buy's New Customer Approach - (A)</i> , Anita Elberse; John T. Gourville; Das Narayandas, Harvard Business School, Product #: 506007-PDF-ENG Case to be handed in <u>by individuals for grading (for people whose last name begins N-P. Submit soft copy to Moodle)</u> CASE MUST BE SUBMITTED TO MOODLE ONE HOUR BEFORE THE START OF CLASS – NO LATE SUBMISSIONS ACCEPTED	<ul style="list-style-type: none"> <i>Class discussion of: Angels and Devils - Best Buy's New Customer Approach - (A) case.</i> All students are expected to have read and prepared this case, not just the students handing it in. Questions will be asked of individual <i>students</i> and responses will count towards class participation <p>DELIVERABLE 1 OF TERM PROJECT DUE 1 HOUR BEFORE THE START OF THIS CLASS. ONE PERSON FROM EACH TEAM TO SUBMIT THROUGH MOODLE</p>
7	Feb. 20	Reading week – No class				
8	Feb. 27	Mid-term examination	Examination to be held in the usual classroom. Content covered in the exam will be all material up to Week 7			
9	Mar. 5	Customer analytics Database Interactivity Data mining Predictive analytics CRM in the cloud Mass customization and personalization Persuasive technology** PRESENTATION BY AN EXECUTIVE FROM	P&R : 8, 10, 12 G: 7, 8 and Appendix	<ul style="list-style-type: none"> <i>Business Intelligence: Making Decisions through Data Analytics: 4: Advanced Business Analysis</i>, Jerzy Surma, Business Expert Press, HBS, Product number: BEP149-PDF-ENG; <i>Innovating With</i> 		<p>Class discussion of assigned readings. All students should have read and prepared the assigned readings.</p> <p>Questions will be asked of individual students and responses will count towards class participation</p> <p>DELIVERABLE 2 OF TERM PROJECT DUE 1 HOUR BEFORE THE START OF THIS CLASS.</p>

	Date	Subject matter	Text readings *	Read article	Student submissions	Group discussion and/or case review – Cases in Coursepack from Harvard Case Publishing Services
		SALESFORCE.COM		<p><i>Analytics</i>, David Kiron, Renee Boucher Ferguson, MIT Sloan Management Review, Case #: SMR433, Product #SMR433-PDF-ENG;</p> <ul style="list-style-type: none"> • <i>Competing on Analytics: The New Science of Winning</i>, Thomas H. Davenport, Jeanne G. Harris, HBS, Product number: 2873ES-PDF-ENG 		ONE PERSON FROM EACH TEAM TO SUBMIT THROUGH MOODLE
10	Mar 12	Relationships with business customers Differences vs. consumer relationships Managing B2B relationships Technologies for B2B relationships	G: 5		<p><i>Customer Profitability and Customer Relationship Management at RBC Financial Group</i> (Abridged), V.G. Narayanan, Lisa Brem Case #: 9-102-072; Product #: 102072-PDF-ENG <u>Case to be handed in by individuals for grading (for people whose last name begins Q-Z. Submit soft copy to Moodle)</u> CASE MUST BE SUBMITTED TO MOODLE ONE HOUR BEFORE THE START OF CLASS – NO LATE SUBMISSIONS ACCEPTED</p>	<ul style="list-style-type: none"> • Discussion of <i>RBC Financial</i> case by class (#: 9-102-072) • All students are expected to have read and prepared this case, not just students handing it in. Questions will be asked of individual students and responses will count towards class participation
11	Mar. 19	Towards a CRM Organization Customer Centric Organizing to create value for individual customers Key Trends and Issues in CRM's Future Capstone discussion of CRM in today's organizations Preparation for final examination	P&R : 13, 14, 15 G: 11	<ul style="list-style-type: none"> • <i>What Customer-Centric Really Means</i>, Stauffer, HBR U0108A • <i>Tuning in to the Voice of the Customer</i>, Allen, Reichheld, Hamilton, HBR U0510C 		Some time may be provided towards the end of class for students to work on final deliverables for term project due next week (time permitting)
12	Mar. 26	Students present term projects to client in groups				<ul style="list-style-type: none"> • Students hand in long-hand report and presentation in hard

	Date	Subject matter	Text readings *	Read article	Student submissions	Group discussion and/or case review – Cases in Coursepack from Harvard Case Publishing Services and soft copy (e-copy).
						<ul style="list-style-type: none"> • Submissions are due one hour before the start of class using the link provided in Moodle
13	Apr. 2	Final examination	Examination to be held in the usual classroom. Content covered in the exam will be all material not covered in the mid-term and may include some questions from the mid-term onwards. See Course Outline for additional detail			

* Notes:

- P&R = Peppers and Rogers text: *Managing Customer Experience and Relationships: A Strategic Framework*, 3rd Edition, Don Peppers and Martha Rogers: John Wiley & Sons.
- G = Gordon text, *Managing the New Customer Relationship*, Ian Gordon: John Wiley & Sons.

** - This discussion will draw on the seminal course text by Prof. B.J. Fogg, *Persuasive Technology*. Students are not expected to purchase this text.

SELECTED BIBLIOGRAPHY

Students wishing to read more on selected subject matter in this course may choose to review some of the following books:

- *Big Data, Big Analytics: Emerging Business Intelligence and Analytic Trends for Today's Businesses* (Wiley CIO), Michael Minelli, Michele Chambers, Ambiga Dhiraj (ISBN 9781118147603)
- *Branded! How Retailers Engage Consumers with Social Media and Mobility*, Bernie Brennan (ISBN 9780470768679)
- *Business Analytics for Customer Intelligence*, Gert Laursen (ISBN 9780470912867)
- *Creating Market Insight - How Firms Create Value from Market Understanding*, Brian Smith and Paul Raspin (ISBN 9780470986530)
- *Customer Data Integration: Reaching a Single Version of the Truth*, Jill Dyche, Evan Levy, Don Peppers, and Martha Rogers (ISBN 9780471916970)
- *Managing Customer Relationships: A Strategic Framework*, Don Peppers and Martha Rogers: John Wiley & Sons - second edition. (ISBN-13: 978-0470423479)
- *Persuasive Technology*, Dr. B.J. Fogg, Director of the Persuasive Technology Lab at Stanford University, Published by Morgan Kaufmann; 1 edition, Dec 30 2002 (ISBN-13: 978-1558606432)
- *Predictive Analytics: The Power to Predict Who Will Click, Buy, Lie, or Die*, Eric Siegel, John Wiley and Sons (ISBN 978-1118356852)
- *Real Time: Preparing for the Age of the Never Satisfied Customer*, Regis McKenna (ISBN 9780875847948)
- *Relationship Marketing: New Strategies, Techniques and Technologies to Win the Customers You Want and Keep Them Forever*, Ian Gordon (the course instructor), published by John Wiley and Sons, 1998 (ISBN 9780471641735)
- *Socialnomics: How Social Media Transforms the Way We Live and Do Business*, Erik Qualman, John Wiley and Sons, (ISBN 9780470638842)
- *Taming The Big Data Tidal Wave: Finding Opportunities in Huge Data Streams with Advanced Analytics* (Wiley and SAS Business Series), Bill Franks, John Wiley and Sons (ISBN 9781118208786)
- *The Executive's Guide to Enterprise Social Media Strategy: How Social Networks Are Radically Transforming Your Business*, Mike Barlow and David B. Thomas, John Wiley and Sons (ISBN 9780470886021)
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