

**Faculty of Liberal Arts & Professional Studies
Customer Relationship Management
AP/ADMS 4255, Section A
Winter, 2021**

Course instructor(s): Ian Gordon

Email address: igordon@yorku.ca

Office hours: no specific office hours are established as this is an online course. The instructor is pleased to meet with students before or after each class by mutual agreement.

Times and locations: Class meets on Thursdays at 11:30 AM on the Zoom online platform. Note that this is an online, synchronous course. This means that we will meet each Thursday at 11:30 AM online using the Zoom platform to review and discuss course material. No in-classroom instruction will occur and there is no opportunity to engage online content other than at the same time as all other students. The entire course, including the submission of assignments, participation/discussion and test-taking, will take place on the course's Moodle and the Zoom platform, as mentioned.

Course webpage: See Moodle

Technical requirements for taking the course:

Several platforms will be used in this course (e.g., Moodle, Zoom, etc.) through which students will interact with the course materials, the course instructor, as well as with one another. Please review this syllabus to determine how the class meets (in whole or in part), and how office hours and presentations will be conducted.

Please note the following:

- Zoom is hosted on servers in the U.S. This includes recordings done through Zoom.
- If you have privacy concerns about your data, provide only your first name or a nickname when you join a session.
- The system is configured in a way that all participants are automatically notified when a session is being recorded. In other words, a session cannot be recorded without you knowing about it.

Please review the [technology requirements and FAQs for Moodle](#).

To participate fully in the course, students will need a computer with a camera and a good microphone. Some students may wish to obtain a microphone to plug into the computer to ensure that they can communicate fully with the class. It is expected that cameras will be turned on during the class and that students will thus be visible to one another and the course instructor throughout the class. Class participation is an important component of this course. It is expected that students will be audible when participating. The chat function in Zoom will also be available for class participation.

Finally, students will need a stable, higher-speed Internet connection with the bandwidth to enable videoconferencing such as the Zoom platform. If you are unsure about the bandwidth of your Internet, please run a speed test using Ookla or a similar app.

Here are some useful links for student computing information, resources and help:

[Student Guide to Moodle](#)

[Zoom@YorkU Best Practices](#)

[Zoom@YorkU User Reference Guide](#)

[Computing for Students Website](#)

[Student Guide to eLearning at York University](#)

Here is a link to the [Speedtest app for Internet speed performance testing](#)

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' cognition, including their 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.

Course objectives and learning outcomes:

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

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 they may find that it is not easy to catch up. Designated readings should be reviewed prior to attending class.

Course readings

Two books are required for this course, as follows:

1. *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). This text is available as an online e-resource. There is a free trial period of 2 weeks but then the text needs to be purchased.
2. *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 as an online e-resource. There is a free trial period of 2 weeks but then the text needs to be purchased.

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/769546>**

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.

Evaluation

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

Mid-term examination	20%
Final examination	20%
Individual analysis and hand-in of a case (max. 10 pages for case)	15%
Group project: research, analysis, and presentation	30%
Class participation	15%
Total	100%

Please note the due dates for the individual case assignment and the group term project, and the dates for the midterm and final examinations. The dates can be found in the Detailed Course Outline that appears below.

Course policies

Class participation

Grades will be assigned for class participation. On a voluntary basis, students are invited to describe what they contributed to each class by sending an email within seven days of a class to classparticipation4255@aol.com. Note that this email address is ONLY to be used for the purpose as mentioned. [If students require urgent engagement with the instructor, please note the email address at the beginning of this Course Outline.] Class participation is based principally on the quality and quantity of contributions in class and also to the team projects. “Quality” means demonstrating academic thoughtfulness, insight and practical application to the instructor and other students, and is more important than the frequency of in class contributions.

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. Attendance will be taken for each class. Discussion exercises are assigned and discussions will be held on team assessments. 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 at that class. (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.

Students will also have an opportunity to contribute to the class participation component of the grade by commenting on the presentations of student groups at the end of the semester by using a survey platform. Feedback from students regarding the presentations of others will be provided to student groups anonymously.

Individual case submissions

Students should write up their individual case submissions 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 different)
- 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)

Cases should be written double-spaced, using 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 ONE HOUR 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 paper to be researched, analyzed and presented by students working in groups

Students will be placed in groups by the course instructor.

The term paper will be done in groups and is intended to be based on detailed and thoughtful secondary research [only secondary research] and should be no more than

15 pages long [double spaced, in Arial 12 point font, 1 inch page margins]. The 15 page limit excludes the cover page, table of contents and appendices. The 15 page limit is a deliberate decision and is intended to focus the paper. Papers that are longer than 15 pages will incur a penalty of 5% per page over the 15 page limit.

Each team will have 20 minutes to present the results of their work. Only do secondary research (e.g. Internet research and publications) – do not do any primary research such as interviews or surveys for this paper. **Secondary research is expected to be detailed and extensive, and will involve considerable work. Approach this assignment as a major TERM project, not a project to be completed in the last week or two of the course. Groups that wait until the last few weeks of the course to begin the assignment should not expect a good outcome – there would simply not be enough time remaining to do justice to the subject matter.**

Hand in long hand paper in soft copy [electronic copy] for grading (maximum 15 pages, as described previously). Also, hand in your PowerPoint presentation in soft copy using the link in Moodle 4 hours before you present – and use MSPowerPoint, no other format (not Apple, not PDF).

All groups will work on the same project which will be discussed following group presentations at the end of the semester.

Students are cautioned to comply with York University's academic integrity policies and specifically not to plagiarise. Do not reuse any content that did not originate with you unless you place such content within inverted commas ("....") and then provide the source. (APA formatting for citations should be used). In addition, do not paraphrase the content of others without attribution as to source as this is plagiarism as well. The matter of plagiarism and academic integrity more generally is treated very seriously by the University and this course instructor. Turnitin will be used to help advise the instructor as to the potential for plagiarism. The instructor has much experience identifying plagiarism and uses sources in addition to Turnitin. He also subscribes to various services such as those that some students might access.

Again, please treat this matter with the seriousness it deserves.

See additional notes on page 12 of this Course Outline.

The following describes the term paper background and expectation.

Background

The subject matter of this course considers how organizations can treat customers as markets of one and explores the strategies, tools and techniques of so doing. Implicit in this course is that consumers will benefit from the new and mutual value that is created by organizations that seek to develop deeper relationships with their customers. Using the theories and technologies considered by this course, it may be said that consumers have never been better served as individuals by their suppliers of services and that data accumulation has enabled much of this through the customization and personalization that has led to even better service, goods, engagement, information, entertainment and much else. This course is all about enabling the upsides of CRM such as those mentioned. But what of the downsides? There is an emerging body of knowledge that

suggests the downsides are material. A number of authors, informed observers and politicians are growing concerned about the near-monopoly power of companies that amass very big data repositories given to them by consumers and which then mine these data, using artificial intelligence, algorithms and behavioral modification to benefit their shareholders with relatively few safeguards for the consumers who provided the data in the first place.

This term project seeks to understand three things: the current state environment for very big data companies, the regulator environment of these organizations, and the future state for consumers if the very big data companies continue on their current path.

This project is not focused on companies that accumulate large data sets about the customers or even what might be termed “big data” companies but rather “very big data” companies, those that have unusual access to customer data, its accumulation, aggregation, analysis and insight, and have near monopoly power within their respective markets. These are the main companies that are the subject of this examination: Facebook, Apple, Amazon, Netflix, Google, Microsoft, and Twitter. In this term project, these firms will be abbreviated as FAANGMT.

Major data organizations have been identified by a number of informed industry observers and participants as having enormous economic and marketplace power that derives directly from the data that as being provided freely by consumers and the firm’s business model, which focuses as much or more on advertisers as it does on the consumer. Companies that have been able to resell consumer data effectively have created enormous shareholder value. The following are examples. While some of these companies derive much of their revenues from their very big data repositories, others are more diversified and/or derive a smaller percentage of their revenues from their customer data. Still, it’s interesting to see how much value has been created in large part by reuse of data that companies get for free from users of their services. As of July, 2020, the market capitalization of the companies mentioned is as follows:

- Facebook: US\$700 billion
- Apple: US\$1.7 trillion
- Amazon: US\$1.6 trillion
- Netflix: US\$241 billion
- Google’s parent company, Alphabet: US \$1 trillion
- Microsoft: US\$1.6 trillion
- Twitter, a company that makes much less use of the data available to them: US\$28 billion

Much of this market value stems from the ability of companies to monitor consumers in multiple ways, including their locations [GPS functionality on their phones], behaviors [such as their interactions and transactions], and even their very thoughts or states of mind [e.g the searches that they plug into search engines, or their posts]. Given the sheer scale of data that FAANGMT now have at their disposal, it might reasonably be asked what potential downsides might derive from such data accumulation and its use for individual consumers and society as a whole.

Expectations

This then is the subject matter of this paper: to consider the implications of data accumulation and its use by major data gatherers such as FAANGMT in the pursuit of customer relationships both in their own interests and on behalf of others, such as advertisers.

Student teams are expected to do much reading in order to inform this subject area before considering how to respond to this project's requirements.

Each team is expected to read at least FIVE (5) of the following books to prepare for this project:

1. *Anti-Social Media: How Facebook Has Disconnected Citizens and Undermined Democracy*, Siva Vaidhyanathan
2. *Bezonomics*, Brian Dumaine
3. *Data and Goliath: The Hidden Battles to Collect Your Data and Control Your World*, Bruce Schneier
4. *How Google Works*, Eric Schmidt and Alan Eagle
5. *Targeted: The Cambridge Analytica Whistleblower's Inside Story of How Big Data, Trump, and Facebook Broke Democracy and How It Can Happen Again*, Brittany Kaiser
6. *The Age of Surveillance Capitalism*, Shoshana Zuboff
7. *The Four: The Hidden DNA of Amazon, Apple, Facebook, and Google*, Scott Galloway
8. *The Hacking of the American Mind*, Robert H Lustig
9. *Weapons of Math Destruction: How Big Data Increases Inequality and Threatens Democracy*, Cathy O'Neil
10. *Zucked, Waking Up to the Facebook Catastrophe*, Roger McNamee

While there are other books that would serve to provide additional insights, this term project requires the reading of *only* FIVE books from this list of books to inform the background to the subject matter. It is obviously overwhelming for any one student to read all these books and that is not the intent. I suggest that one book be assigned to each team member and each team member should prepare a 2-3 page summary/synopsis of the book they read for inclusion in the final report's Appendix.

These books are all available in the Toronto library and most other library systems (possibly including York's); students should immediately place a hold on these books as it can take some weeks for them to become available. If the hold will take longer than a week or two, students will need to acquire the books other than via library systems.

Other secondary research, such as article gathering and review, viewing of a number of TED talks on the subject, and gathering data on the regulator environment [as will be discussed in the expected output] should also be undertaken. For example, there are a number of articles that consider George Soros' views when it comes to the near-monopolies of major data gatherers and these articles should be reviewed. These tasks might either be assigned to one student or shared among students in the team.

Once the books have been read and secondary research conducted, the team should meet to assemble a framework to respond to the project as discussed below.

Deliverables

The following is the recommended structure for the report. Use this as a starting point and modify by adding subsections as you consider appropriate AFTER doing the background research for which you have been asked. It is not expected that students will subtract any sections from those that appear below. Importantly, note that this project is FACT-based and should therefore provide as much factual evidence as possible for any statements, with full referencing of any sources used:

- A. Learning objectives [what do you want the reader of your report to know by the end of this discussion]
- B. Current state
 - a. Explain the business models of the FAANGMT and their reliance on the use of consumer data
 - b. What data are gathered by FAANGMT?

A review of the types of data gathered by companies such as FAANGMT, and the amount of data that each company has.
 - c. How do FAANGMT use the data they have?
 - d. Why do consumers provide data without being (directly) compensated for it?
- C. The regulatory environment
 - a. What restrictions are there at present on the gathering and use of consumer data? Summarize restrictions in major markets such as:
 - PIPEDA – Personal Information Protection and Electronic Documents Act – in Canada,
 - GDPR – General Data Protection Regulation – in Europe, and
 - CCPA – the California Consumer Privacy Act.

The regulator environment is a lengthy, complex and detailed subject on its own and a very detailed analysis is thus not expected here. Provide a high-level view with a summary table to show what the main areas are that are covered by the regulator the regimes as mentioned and the major differences among them.
 - b. Describe the current state of consumer data protection and privacy in the US [not just California].

- D. Future state

Recognizing the data that FAANGMT companies have available, the uses to which they put these data, and the restrictions that are presently in place on their use, what might the future state look like for data use by major organizations such as FAANGMT if no further restrictions apply? That is, how might the future be different from the current state when it comes to use of data, privacy and consumers' satisfaction with their

implicit bargain (which is the giving of free data in exchange for convenience and other benefits)?

Develop three scenarios that project the future 3-5 years from now, as follows

- a. The future is the same as the present for data gathering, use, and consumer satisfaction
- b. There is considerably more data-gathering, more use of consumer data, and declining consumer satisfaction with their implicit bargain
- c. There is exponentially more data-gathering and use of consumer data, and considerably less consumer satisfaction with their implicit bargain

For each scenario mentioned above consider data-gathering, use and consumer satisfaction, including:

- What additional sources of data might FAANGMT develop?
- To what additional applications might FAANGMT put their data? That is, how else might these companies use their data?
- How would consumers notice a difference from the current state environment?
- Might consumers re-evaluate the basis for data provision without charge [with supporting rationale]? What might the implications of your answer be [with supporting rationale]?
- What might the implications be for privacy? Will any real privacy remain? Why might privacy loss be a concern, and to whom?
- Any other thoughts – with supporting rationale – about implications of the scenarios more generally, such as for stakeholders, data management, near monopolies of data gathering, and so on?

E. Conclusions

- a. What do you conclude from your examination and assessment? Summarize your main learnings, such as implications for all stakeholders, and make sure that you have fully addressed the statement of objectives as provided at the outset.
- b. What are the implications of what you have learned in this term project for the course theory that you have learned during the semester? This is a deliberately broad question and invites students to consider the interplay between the knowledge they have developed in the term project and the course theory, such as the application of course theory to the issue of a “very big data” and its use by companies such as those considered in the term project.

Appendices

Synopses. Provide a 3-4 page synopsis (abbreviated summary with material observations) of each book that has been read to prepare for this

submission. This is a *requirement* of the submission (any submissions that do not have this content will receive a 5% penalty for each synopsis that is missing).

Provide charts, tables, and any other data or analysis that is pertinent to this assignment. The appendices should not exceed about 10 pages

List sources used to compile your report.

THIS GROUP ASSIGNMENT WILL TAKE A LONG TIME TO COMPLETE AS IT IS A TERM PROJECT. YOU SHOULD START PREPARING TO CONDUCT THE PROJECT NOW.

Group presentations

Each group will present a term paper online. Provide the presentation in MICROSOFT POWERPOINT format (no other formats, please) via Moodle at least 4 hours before the start of class. The course instructor will mount the presentation on his desktop and unmute microphones and cameras so students can present. The speaking student should just say “next slide” to advance the presentation.

Present your material using a professional tone and manner, and be crisp and to the point. The presentation does not need to cover everything – just the right things! Prepare your presentation and rehearse it so it works well. All members of the team do not need to present unless this is your team’s preference but at least two members of the team should present.

Students will be provided with an opportunity to consider and rate the presentations of other groups and this feedback will be given to the presenters. As mentioned previously, students who provide their views in a thoughtful and comprehensive manner in this online survey will receive credit towards class participation.

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. Students should 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 together successfully. 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 actively 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].

For greater clarity, 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 what will actually be expected of you in your future business careers. More about this as we progress through the semester.

Individual work

York's policy regarding academic honesty and integrity applies. It is assumed that work submitted by an individual student is the original work of the student alone. Violation is grounds for prosecution under the rules of the University. More specifically, **identify what content is not yours with full attribution with references, and:**

- **do not plagiarize anybody, ever, on any platform, using any media,**
- **do not self-plagiarize including reusing a paper you prepared previously – perhaps for another course – in this course,**
- **do not copy the paper of another student in whole or in part,**
- **do not use any material purchased online or papers or other content from the Internet or elsewhere without referencing the source.**

Where no sources are mentioned, the work will be assumed to be yours alone. If this proves not to be the case, VERY severe repercussions will generally result.

Academic honesty and integrity

In this course, we strive to maintain academic integrity to the highest extent possible. Please familiarize yourself with the meaning of academic integrity by completing SPARK's Academic Integrity module at the beginning of the course. Breaches of academic integrity range from cheating to plagiarism (i.e., the improper crediting of another's work, the representation of another's ideas as your own, etc.). All instances of academic dishonesty in this course will be reported to the appropriate university authorities, and can be punishable according to the Senate Policy on Academic Honesty.

Turnitin

All assignments are submitted through Turnitin which checks for plagiarism, as does the course instructor. Students may opt out of the use of Turnitin for plagiarism by requesting this from the course instructor. This may only be done in advance as it will be generally assumed that Turnitin will be used for all students. Where a student seeks to opt out from the use of Turnitin, other mechanisms, methods and/or technologies will be identified and described by the course instructor to achieve the same objective.

The use of Turnitin means, among other things, that students consent to the use of their material for inclusion as source documents in the Turnitin.com reference database, where they will be used only for the purpose of detecting plagiarism. The terms that apply to the University's use of the Turnitin service are described at Turnitin.com.

Deferred standing

Deferred standing may be granted to students who are unable to write their final examination at the scheduled time or to submit their outstanding course work on the last day of classes. Details can be found at

<http://myacademicrecord.students.yorku.ca/deferred-standing>

As communicated to the University community on March 13, 2020, Senate Executive has agreed to waive until further notice the requirement for students to submit an Attending Physician's Statement in support of a request for deferred standing or petitions.

DSA Form: http://www.registrar.yorku.ca/pdf/deferred_standing_agreement.pdf

In order to apply for deferred standing, students must register at <https://sas-app.laps.yorku.ca/>. Followed by handing in a completed DSA form and supporting documentation directly to the main office of the School of Administrative Studies via email (apsas@yorku.ca) providing your ticket number and attaching the DSA form. The DSA must be submitted no later than five (5) business days from the date of the exam. These requests will be considered on their merit and decisions will be made available by logging into the above-mentioned link. No individualized communication will be sent by the School to the students (no letter or e-mails). Students with approved DSA will be able to write their deferred examination during the School's deferred examination period. No further extensions of deferred exams shall be granted. The format and covered content of the deferred examination may be different from that of the originally scheduled examination. The deferred exam may be closed book, cumulative and comprehensive and may include all subjects/topics of the textbook whether they have been covered in class or not.

Grades Release Dates (Grade Reports and Transcripts)

Grades submitted by an instructor are subject to review by the teaching unit in which the course is offered and by the Faculty Council or Faculty Committee on Academic Policy and Planning. Final course grades may be adjusted to conform to program or Faculty grades distribution profiles. Normally, grades appear on grade reports and transcripts as soon as they are submitted to the Registrar's Office.

Schedule of readings and activities

Please note the following [important dates](#) for Fall/Winter 2020-21:

- For both full-year (Y) and Fall-term (F) courses, classes will start on September 9, 2020. Winter-term (W) classes will start on January 11, 2021.
- Reading Week will occur between October 10 and 16, 2020 in the Fall term, and between February 13 and 19, 2021 in the Winter term.
- The last date to submit term work is December 9 in the Fall term, and April 13 in the Winter term. December 9 is also a Fall Study Day.

Detailed course outline

Week/date	Subject matter	Readings and activities before class [numbers after book authors apply to chapter numbers]	Submissions and activities during class
Week 1 January 14	<i>Introduction</i> Structure of course Mutual expectations CRM definitions Key principles and selected learnings	Access e-books for Peppers and Rogers (P&R), and Gordon (G) Read: P&R 1 and G 1 Complete the Academic Integrity Module Buy course pack from Harvard Case Publishing Services Read: <i>A Framework for CRM</i> , Russell S. Winer, HBR/California Management Review CMR209	No submissions are due Explanation of cases to be handed in for individuals
Week 2 January 21	<i>Customers and relationships</i> Tomorrow's customers in Canada Customer loyalty and satisfaction Permission and privacy Contrasting B2B and B2C relationships Relationships with stakeholders in addition to customers Trust	Read: P&R 2 and G 2 <i>Preventing the Premature Death of Relationship Marketing</i> , Fournier, Dobscha, Mick, HBR Avoid the Four Perils of CRM, Rigby, Reichheld and Scheffer, HBR R0202 98106 Prepare the case: <i>Harrah's Entertainment</i> , Rajiv Lal, Patricia Martone Carrolo HBS 9-502-011	Assignment of individuals to groups. Explanation of term project and related expectations. Students should immediately begin planning the term project Assignment of topics to groups Class discussion of: <i>Harrah's Entertainment</i> , Rajiv Lal, Patricia Martone Carrolo HBS 9-502-011 This is an important case as it was one of the first times a company revolutionized an industry based on CRM.
Week 3 January 28	<i>Planning relationships</i> IDIC model CREVITS model The Customer Relationship Cycle Practical issues in CRM planning Avoiding some mistakes companies make when planning CRM	Read: P&R 3,4,6 Read: G 3 <i>Is your company ready for One-to-One Marketing?</i> , Peppers, Rogers, Dorf, HBR 99107 Read and prepare case: <i>Social Strategy at Nike</i> . All students are expected to have read and prepared this case.	Class discussion of: <i>Social Strategy at Nike</i> , Mikolaj Jan Piskorski, Ryan Johnson, Harvard Business School, Case #: 9-712-484, Product #: 712484-PDF-ENG

Week/date	Subject matter	Readings and activities before class [numbers after book authors apply to chapter numbers]	Submissions and activities during class
Week 4 February 4	<i>Communicating with individual customers</i> A learning relationship Multichannel marketing communications Privacy and permission Customer differentiation: need	Read: P&R 7,9 Read: <i>The Perfect Message at the Perfect Moment</i> , Kalyanam and Zweben, HBR R0511G Read: <i>E-Loyalty: Your Secret Weapon on the Web</i> , Reichheld, HBR 5181 Read and prepare case: <i>Privacy Issues and Monetizing Twitter</i> , Deborah Compeau, Nicole R.D. Haggerty, Shady Fraiha, Apr 15, 2011, Richard Ivey School (available from HBS), Product number: W11037-PDF-ENG All students expected to have prepared case, not just the students handing it in	<u>For last names that begin A-F</u> , hand in <i>Privacy Issues and Monetizing Twitter</i> Submission due before 10:30 AM through Moodle. No late submissions accepted Discussion of case will take place in class.
Week 5 February 11	<i>Customer differentiation [continued]</i> Differentiation by value Differentiation by customer influence Calculating the cost of CRM Lifetime Customer Value Share of customer Loyalty programs CRM metrics	Read: P&R 5,11,12 Read: <i>CRM Done Right</i> , Rigby & Ledingham, HBR R0411H Read and prepare case: <i>Hilton HHonors Worldwide: Loyalty Wars</i> , HBS 9-501-010 All students expected to have prepared case, not just the students handing it in	<u>For last names that begin G-M</u> , hand in <i>Hilton HHonors Worldwide: Loyalty Wars</i> , HBS 9-501-010 Submission due before 10:30 AM through Moodle. No late submissions accepted Discussion of case will take place in class. Preparation for midterm
Week 6 February 18	Reading Week – No class will be held this week		
Week 7 February 25	Mid-term examination Examination to be held online. Comprises multiple choice questions. Content covered in the examination will be all material up to and including Week 5		
Week 8 March 4	<i>Real time and mobile relationships</i> Relationships with social and mobile customers Social media taxonomy and considerations for	Read: P&R 12 Read: G 4,6 Read: <i>CRM: Profiting from understanding customer needs</i> , Stringfellow, Nie, Bowen HBS/Business Horizons Article – BH158	<u>For last names that begin N-P</u> , hand in <i>Angels and Devils: Best Buy's New Customer Approach - (A)</i> , Anita Elberse; John T. Gourville; Das Narayandas, Harvard Business School, Product

Week/date	Subject matter	Readings and activities before class [numbers after book authors apply to chapter numbers]	Submissions and activities during class
	CRM Engaging the “always connected” customer	Read: <i>Real-time Marketing</i> , Regis McKenna, HBR 95407 Read and prepared case: <i>Angels and Devils: Best Buy’s New Customer Approach</i> - (A), Anita Elberse; John T. Gourville; Das Narayandas, Harvard Business School, Product #: 506007-PDF-ENG	#: 506007-PDF-ENG Submission due before 10:30 AM through Moodle. No late submissions accepted Discussion of case will take place in class
Week 9 March 11	<i>Customer analytics</i> Database Interactivity Data mining Predictive analytics CRM in the cloud <i>Mass customization and personalization</i> <i>Persuasive technology**</i>	Read: P&R 8,10,12 Read: G 7,8, Appendix Read: <i>Business Intelligence: Making Decisions through Data Analytics: 4: Advanced Business Analysis</i> , Jerzy Surma, Business Expert Press, HBS, Product number: BEP149-PDF-ENG; Read: <i>Innovating With Analytics</i> , David Kiron, Renee Boucher Ferguson, MIT Sloan Management Review, Case #: SMR433, Product #SMR433-PDF-ENG; Read: <i>Competing on Analytics: The New Science of Winning</i> , Thomas H. Davenport, Jeanne G. Harris, HBS, Product number: 2873ES-PDF-ENG	Class discussion of assigned readings. All students should have read and prepared the assigned readings.
Week 10 March 18	<i>Relationships with business customers</i> Differences versus consumer relationships Managing B2B relationships Technologies for B2B relationships	Read: G 5 Read and prepared case: <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	For last names that begin Q-Z , hand in case: <i>Customer Profitability and Customer Relationship Management at RBC Financial Group</i> Submission due before 10:30 AM through Moodle. No late submissions accepted Discussion of case will take place in class
Week 11 March 25	<i>Towards a CRM organization</i> Customer centric Organizing to create	Read: P&R 13,14,15 Read: G 11 Read: <i>What Customer-Centric Really Means</i> , Stauffer, HBR	Discussion of assigned readings Preparation for final examination

Week/date	Subject matter	Readings and activities before class [numbers after book authors apply to chapter numbers]	Submissions and activities during class
	value for individual customers Key trends in CRM's future Capstone discussion of CRM in today's organizations	U0108A Read: <i>Tuning in to the Voice of the Customer</i> , Allen, Reichheld, Hamilton, HBR U0510C	
Week 12 April 1	<i>Presentations</i> Students present term papers in groups		Students hand in long hand reports and presentations in soft copy (e-copy)
Week 13 April 8	<i>Final examination</i>	Examination to be held online. Content covered in the examination will be all material not covered in the midterm. Examination will comprise multiple choice questions.	

* 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*, Stanford University. Students are not expected to purchase this text.