

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

Course instructor(s): Ian Gordon

Email address: igordon@yorku.ca

Office hours: no specific office hours are established. The instructor is pleased to meet with students before or after each class (whether on Zoom or in person), or other times by mutual agreement.

Times and locations: Class meets on Tuesdays at 7:00 PM. Classes will either be on the Zoom platform **OR** in person, on campus. When classes are on campus, classes will be in room DB 001.

See “Detailed Course Outline” on page 13 for information about the location of each class. Note that this is a synchronous course which means that lectures occur in real time with no opportunity to review recordings.

Course webpage: See Moodle eClass

Safety: When classes are held in person, safety will be the highest priority. Protocols to help ensure the safe conduct of classes during this pandemic will be discussed at the first in person class. Please follow any signs you see before entering class and wear a mask at all times.

Technical requirements for taking the course:

In addition to meeting in person, in classroom, a number of 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, where and when the class meets and how 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 working camera and a good microphone. If your computer's microphone or soundboard doesn't produce sufficient audio output, you may wish to obtain an external microphone to plug into the computer to ensure that you can be heard when you communicate with the class. It is

expected that cameras will be turned on during any classes held on the Zoom platform 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 sufficient bandwidth to enable videoconferencing such as on the Zoom platform. If you are unsure about the performance of your Internet service, 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 teamwork.

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. The team (or some among its members) will present on the last class before the final examination. 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 but the book cannot be downloaded. The link to the book is in Moodle. If you require the entire book in hard copy, this will need 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/841413>

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	25%
Class participation	20%
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.

At classes 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 using a survey. 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 did not originate with you. Reference using APA format.

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. Including the cover page, appendices, etc. the report should not exceed 22 pages in total.

Each team will have 15 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 at least 4 hours before you present – and use MSPowerPoint, no other format (not Apple, not Google, 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 a number of sources in addition to Turnitin. He also subscribes to various services and monitors plagiarism and other platforms such as those that some students might access.

Again, please treat this matter with the seriousness it deserves. All instances of plagiarism are met with careful review and serious penalties can result. To those few students who consider this hyperbole: please don't ask for leniency or provide excuses after the fact. Please treat this as fair warning. Unfortunately, we have experience

dealing with this issue and negative outcomes almost always result for students who overlook this important matter or treat it lightly.

See additional notes on page 12 of this Course Outline.

The following describes the term paper background and expectation.

Background

Students will work together in teams to research and report on the CRM subject discussed below. The consideration should NOT be drawn from a student's personal knowledge and experience [although they may be some individual knowledge that can be used to illustrate specific concepts or approaches]. Rather, the assessment should be comprised principally from research conducted in, for example, academic journals, books, trade publications and scholarly sources. Of course, when illustrating academic principles and concepts -- such as with examples, students should feel free to visit company websites, review blogs, and draw on their own experience, observations and research with other than scholarly sources but please note that personal content (your own feelings or experiences) should be less than 5% of the entire submission. Students who provide little more than their own personal experience in this paper should not expect anywhere close to a passing mark.

It is expected that students will consider and interpret scholarly sources and not merely present the content of others. Academic reflection on the work of others would be outside the 5% limit for personal experience discussion as just noted and would generally be based on sound arguments and other considerations rather than simply personal experience. For greater clarity, the expectation here is that students will avail themselves of academic sources and consider these rather than simply discussing their own experiences and feelings in the submission. There is no limit on the amount of content a student should personally write as opposed to the works of others that are incorporated in the submission. The guidance here is for your assignment to not simply be a compendium of the works of others but rather a considered academic submission that has a very limited amount of content that is unsubstantiated such as a student's personal feelings and experiences.

When approaching the subject matter, students should first state what they are intending to demonstrate or prove, then use relevant theory from within the course and beyond [scholarly articles and journals, textbooks, etc.] to inform their answers, describe the situation organizations face, find supporting examples to illustrate the theories that will have been presented and suggest or prescribe opportunities for organizations to consider implementing. That is, the papers should pay close attention to what it is organizations (principally companies and not-for-profits) can actually do as a result of the work students will have done.

The Planned Management of Customer Experience

According to the text, *Managing Customer Experience and Relationships*, by Don Peppers and Martha Rogers, "customer experience is the sum total of a customer's individual interactions with a product or company, over time." The text emphasizes the following elements:

- Individual – an individual's perceptions and impressions of the experience matter much more than what the company thinks it is providing.
- Interactions – interactions occur in communications channels that are direct rather than using mass media. That is, for an interaction to have occurred, communication needs to be reciprocal i.e. occurring in two directions, from the company to the customer and from the customer to the company.
- Cross-functional and multi-enterprise – customer experience applies to all of the company's marketing, selling, and servicing entities and may include organizations not directly under the company's control such as dealers, distributors, advertising agencies, and retailers that may sell the manufacturer's products. From the customer's point of view, all of these entities combine to deliver the total experience that the customer perceives.
- Longitudinal – customers' experiences accrue across time and are not isolated to a single contact or interaction.
- Integration – for a company to deliver the superior customer experience, all of the above issues need to be considered, and, in particular, all interaction communications channels between the company and its customers need to be integrated.

This semester, students will develop a term paper to inform and illustrate how organizations approach customer experience management in the context of CRM.

The focus of the paper will be on both academic theory and practical examples to inform that theory. Do not find a company and then make your whole paper about that company. Rather, follow the structure as described below, starting with theory in the generality before thinking about specific examples.

Clearly state the learning objectives you are seeking to achieve in your term paper and make sure that you have indeed accomplished this when you reach the end of your paper.

Structure your research paper as follows:

1. Objectives of your paper

What are you trying to accomplish in this paper? What is the main issue or question you want to resolve? (Think deeply about what you're trying to accomplish so that by the end of your paper you will have achieved this)

2. The theory of Customer Experience Management (CEM)

a) Definition.

Define Customer Experience Management. Perhaps you can use the definition that was provided to you earlier from Peppers and Rogers.

b) Key concepts.

What are the main elements of Customer Experience Management? For example, journey mapping is a central component. What are other areas of consideration? In aggregate, these elements should together comprise Customer Experience Management.

c) Rationale.

Why do organizations use Customer Experience Management to improve their business performance? Describe the main reasons organizations pay attention to this subject matter.

d) Applications.

Customer experience management can be used in many applications including online and at every point of the customer's interaction with the organization. Discuss.

e) Linkage to CRM.

Discuss the relationship between Customer Experience Management on the one hand and CRM on the other. Show the theoretical connections. For example, you might introduce and then discuss the IDIC model in the context of Customer Experience Management. Consider other aspects that you have learned in this course and show theoretical connections between Customer Experience Management and CRM.

3. Examples of Customer Experience Management in action.

Using specific examples of organizations that you have researched, provide one detailed example for each of the following aspects to show how a firm or not-for-profit (such as a charity) approaches the issue (conduct independent study to understand any concepts that are unfamiliar to you here). You should not use one firm as an example for all of these aspects – you probably will not find information to allow for this in any event. Again, provide one example for each of the following:

- Developing a journey map for organizations online
- Developing a journey map for organizations that primarily operate offline, such as retailers with physical stores, restaurants, professional services firms, companies that sell to other companies without an online presence, etc.
- Designing or redesigning customer touch points
- Creating a two-way dialogue with individual customers
- Measuring individual customers' perceptions and experiences
- Developing customer experience management strategy to integrate multiple considerations, functions and even enterprises beyond that of the organization, such as their suppliers.

Each of the above exemplars and considerations should be about 1 page [double spaced, Arial 12 point font]. Use the following structure for each of the items that appear above:

- Subject heading (e.g. Developing a journey map for organizations online)
- Name of organization (e.g. Wal-mart)
- Objective [what was the organization trying to accomplish?]
- Method or approach that the organization adopted
- Outcome [what was the result of the work they did?]
- Key learning or learnings from this example

4. Concluding observations

What are the main observations you have derived from your work that would be of general applicability to all organizations in Canada? Make sure that this section wraps back to the objectives you stated at the outset of this paper and ensures that all objectives are fully met.

Appendices:

- a) Sources you used (describe the actual source is used to prepare your paper -- i.e. what you used to inform your work)
Students are NOT to do any primary research such as interviews and surveys to conduct this assignment. All research is to be from secondary sources.
- b) Any tables, graphics or charts that you have used in your report that you want to include should go in this section.

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 team will have 15 minutes to present the results of their work.

Provide the presentation in MICROSOFT POWERPOINT format (no other formats, please. Not pdf. Not an Apple or Google format) via Moodle at least 4 hours before the start of class. The course instructor will mount the presentation so students can present.

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 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. This includes a prohibition on paraphrasing,**
- **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.** More specifically, students are cautioned not to download nor use any content from any web platforms that enable plagiarism – and not to upload to these platforms either.

Uploading content could breach academic honesty if another student downloads and plagiarizes (including paraphrasing). If this happens, the student who uploaded content will become part of the investigation and breach of academic honesty charges could be filed. It is also *not permissible to upload copyrighted material such as the Course Outline or any course content or summary thereof to course platforms as doing so breaches Canadian intellectual property legislation.*

The above is a partial list of selected violations that the instructor has (unfortunately) seen in the past. For a complete discussion of academic integrity, see the University's Senate Policy on Academic Honesty. This can be found at the following address: <https://secretariat-policies.info.yorku.ca/policies/academic-honesty-senate-policy-on/>

Where no sources are mentioned, the work will be assumed to have originated with the student 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.

No posting of course content

Students may not upload, post, store or otherwise communicate course content – including this course outline and any course material or summary thereof or any notes about the course content – on the Internet using any platforms or media.

More specifically, students may not upload course content to websites that provide students with content uploaded by other students. As mentioned previously, doing so will generally be viewed as a breach of academic honesty and may be punishable according to the Senate Policy on Academic Honesty.

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 the Fall, 2021:

- Fall course classes will start on September 8, 2021.
- Last date to add a course without permission of instructor is Sept. 21
- Last date to add a course with permission of instructor is Oct. 5
- Last date to drop a course without receiving a grade is Nov. 12
- Course Withdrawal Period (withdraw from a course and receive a grade of "W" on transcript) is Nov. 13 - Dec. 7

Detailed course outline

W h e r e	Class/ date	Subject matter	Readings and activities before class [numbers after book authors apply to chapter numbers]	Submissions and activities during class
Z O O M	CI 1 Sept 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
Z O O M	CI 2 Sept 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 Schefter, 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 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.
Z O O M	CI 3 Sep 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

W h e r e Z O O M	Class/ date	Subject matter	Readings and activities before class [numbers after book authors apply to chapter numbers]	Submissions and activities during class
	CI 4 Oct 5	<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 4:00 PM through Moodle. No late submissions accepted. Discussion of case will take place in class.
	Oct 12	<i>Reading week. No classes this week.</i>		
Z O O M	CI 5 Oct 19	<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>Filene's Basement</i> by Jill Avery and Susan Fournier Case #: 314076-PDF-ENG All students expected to have prepared case, not just the students handing it in	<u>For last names that begin G-L</u> , hand in <i>Filene's Basement</i> Submission due before 4:00 PM through Moodle. No late submissions accepted. Do not approach this case in the usual way. Answer the following in your case response in a comprehensive manner: 1. Assess Norma's value to Filene's Basement as a customer. Include in your assessment where you would place Norma on the customer profitability pyramid, what Norma's customer lifetime value is, her revenue contribution, the behaviors that enhance her revenue contribution, her costs to serve, the behaviors that increase cost to serve, her loyalty and likely retention, and any other value that Norma provides in addition to contribution margin over her

W h e r e	Class/ date	Subject matter	Readings and activities before class [numbers after book authors apply to chapter numbers]	Submissions and activities during class
				<p>purchasing lifetime. Quantify each aspect of the customer lifetime formula [below] to the extent you can and then consider qualitative elements. [Customer lifetime value = (annual contribution margin X years of purchasing) - upfront cost of acquiring a customer]</p> <p>2. Once you have answered the above completely, evaluate Filene's Basement's decision to fire Norma, whether this is a good or bad decision and provide reasons for your answer. Consider what other courses of action might have been used.</p> <p>Discussion of the above questions will take place in class.</p> <p>Preparation for midterm</p>
O N C A M P U S Z O O M	CI 6 Oct 26	<p>Mid-term examination Examination will be held in class. Comprises multiple choice questions. Content covered in the examination will be all material up to and including Class 5</p> <p>STUDENTS WILL NEED TO BRING A LAPTOP INTO THE EXAMINATION ROOM AS THE EXAMINATION WILL TAKE PLACE ONLINE, IN THE CLASSROOM ITSELF. STUDENTS CANNOT TAKE THE EXAMINATION AT A DISTANCE</p> <p><u>STUDENTS WILL BE PROVIDED WITH A PASSWORD TO TAKE THE EXAM AT THE TIME OF THE EXAMINATION.</u></p>		
	CI 7 Nov 2	<p><i>Real time and mobile relationships</i></p> <p>Relationships with social and mobile customers</p> <p>Social media taxonomy and considerations for CRM</p> <p>Engaging the “always connected” customer</p>	<p>Read: P&R 12</p> <p>Read: G 4,6</p> <p>Read: <i>CRM: Profiting from understanding customer needs</i>, Stringfellow, Nie, Bowen HBS/Business Horizons Article – BH158</p> <p>Read: <i>Real-time Marketing</i>, Regis McKenna, HBR 95407</p> <p>Read and prepare case: <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</p>	<p>For last names that begin M-O, 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 #: 506007-PDF-ENG</p> <p>Submission due before 4:00 PM through Moodle. No late submissions accepted.</p> <p>Discussion of case will take place in class</p>

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Z O O M	CI 8 Nov 9	<p><i>Customer analytics</i></p> <p>Database</p> <p>Interactivity</p> <p>Data mining</p> <p>Predictive analytics</p> <p>CRM in the cloud</p> <p><i>Mass customization and personalization</i></p> <p><i>Behavioral insights</i></p>	<p>Read: P&R 8,10,12</p> <p>Read: G 7,8, Appendix</p> <p>Read: <i>Harnessing Behavioral Insights: a Playbook for Organizations</i>, by Bing Feng, Jima Oyunsuren, Mykyta Tymko, Melanie Kim and Dilip Soman, Rotman Magazine, ROT385. The article is in your course kit. Product number: ROT385-PDF-ENG</p> <p>Read and prepare case: <i>Making stickK Stick: The Business of Behavioral Economics</i>, Leslie K. John, Michael Norris, Michael I. Norton [Case No.: 5-515-088 Apr 17, 2014 (Revised: Jun 3, 2015)] Product number: 514019-PDF-ENG</p> <p>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</p>	<p><u>For last names that begin P-S</u>, hand in: <i>Making stickK Stick: The Business of Behavioral Economics</i>, Leslie K. John, Michael Norris, Michael I. Norton [Case No.: 5-515-088 Apr 17, 2014 (Revised: Jun 3, 2015)] Product number: 514019-PDF-ENG https://hbsp.harvard.edu/product/514019-PDF-ENG</p> <p>Submission due before 4:00 PM through Moodle. No late submissions accepted.</p> <hr/> <p>Class discussion of assigned readings, esp. <i>Harnessing Behavioral Insights</i>. All students should have read and prepared the assigned readings.</p>
	CI 9 Nov 16	<p>Technology and relationships</p> <p><i>Persuasive technology**</i></p> <p>Social media and persuasive technologies</p> <p>Case:</p> <p>Tommy Hilfiger and Calvin Klein Post-COVID-19: What's in Store?</p> <p>HPB# IM1136, IMD-7-2265</p>	<p>Read: G 5</p> <p>Read and prepared case: <i>Tommy Hilfiger and Calvin Klein Post-COVID-19: What's in Store?</i> HPB# IM1136, IMD-7-2265</p>	<p><u>For last names that begin T-Z</u>, hand in case:</p> <p><i>Tommy Hilfiger and Calvin Klein Post-COVID-19: What's in Store?</i> HPB# IM1136, IMD-7-2265</p> <p>In the Situation Analysis, consider the challenges the fashion industry faced during the COVID-19 crisis and the difficulties PVH faced due to COVID-19. How well-equipped was the company to deal with the sudden disruptions and the market shifts? Perform a SWOT analysis.</p>

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				Then complete the case as you would usually do. Submission due before 4:00 PM through Moodle. No late submissions accepted. Discussion of case will take place in class
	CI 10 Nov 23	<i>Relationships with business customers</i> Differences versus consumer relationships Managing B2B relationships Technologies for B2B relationships <i>Towards a CRM organization</i> Customer centric Organizing to create value for individual customers Key trends in CRM's future Capstone discussion of CRM in today's organizations	Read: P&R 13,14,15 Read: G 11 Read: <i>What Customer-Centric Really Means</i> , Stauffer, HBR U0108A Read: <i>Tuning in to the Voice of the Customer</i> , Allen, Reichheld, Hamilton, HBR U0510C	Discussion of assigned readings Preparation for final examination
	CI 11 Nov 30	Presentations Students present term papers in groups (15 minutes)		Students hand in long hand reports and presentations in soft copy via Moodle (e-copy) Presentations and reports should be submitted before 4:00 pm on November 30, 2021
Z O O M	CI 12 Dec 7	Final examination	Examination to be held in class. Content covered in the examination will be all material not covered in the midterm. Examination will comprise multiple choice questions. STUDENTS WILL NEED TO BRING A LAPTOP INTO THE EXAMINATION ROOM AS THE EXAMINATION WILL TAKE PLACE ONLINE, IN THE CLASSROOM ITSELF. STUDENTS CANNOT TAKE THE EXAMINATION AT A DISTANCE <u>STUDENTS WILL BE PROVIDED WITH A PASSWORD TO ACCESS THE EXAMINATION AT THE TIME OF THE EXAM</u>	
O N C A M P U S				

* 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.