

**Faculty of Liberal Arts & Professional Studies
Customer Relationship Management
AP/ADMS 4255, Section A
Fall, 2024**

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, or other times by mutual agreement.

Times and locations: Classes meet on **Tuesdays** in the Fall, 2024 semester starting at **7:00 pm.**

All classes are in person on campus – York University Keele campus, in Victor Phillip Dahdaleh Building **(DB) 0006**

Course webpage: See Moodle eClass

Health and Safety: Health and safety will be the highest priority as we look after one another at person classes. Students are encouraged to wear a mask at class, sit with one empty seat separating each student from the next, keep social distance from one another and the course instructor. Wearing a mask is not obligatory but is preferred.

Due to the possibility of battery fires, students are not permitted to bring e-bikes or e-scooters into class or to put bikes/scooters within 25 feet of the lecture room door outside the lecture room.

Technical requirements for taking the course:

Students will need a laptop computer to participate in this course. Classes will assume that students have access to and can use a laptop computer in the lecture theatre.

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, secondary research, and a team project focused on a current or emerging customer relationship issue of importance. 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*, **Fourth Edition**, Don Peppers and Martha Rogers: John Wiley & Sons. (The first and second editions of the Peppers and Rogers text are not to be used for this course. The third edition is also not encouraged). This text is not available as a free online e-resource without cost to students and 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/1186827>

Readings and cases are assigned to specific classes; review before class.

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 presentations (Interim presentation: 5%; Final presentation and long form report: 25%)	30%
Class participation	15%
Total	100%

Please note the due dates for the individual case assignment and the group term project submissions, 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. Students who do external research beyond the case should assume that they will receive reduced marks for their case as this research complicates the analysis and assessment.

When you have completed your case, submit via the link provided on Moodle. Submissions will not be accepted by email. Note the date and time by when the submission must be made. No late submissions are accepted, and no extensions are available. CASES MUST BE SUBMITTED BEFORE THE STIPULATED TIME IN THE COURSE OUTLINE (BELOW) 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 using the randomized group assignment mechanism in eClass.

This semester students will explore an emerging issue of importance to customer relationships and their management. Our focus this semester will be on the metaverse.

The following provides guidance regarding the term project.

Background:

A metaverse is a virtual-reality (VR) space in which users can interact with computer-generated environments and other users. If you have played a game such as Fortnite or World of Warcraft, you have entered a 3D virtual world. The metaverse builds on this concept.

For background on the metaverse, students are referred to a recent article I authored in the Ivey Business Journal. The article is entitled, *Metaverse or Metaworse*. Students are also expected to have read the book, *Ready Player One*, by Ernest Cline. (The movie by this name can also be viewed or viewed instead as it is a fairly faithful visualization of the book).

Project objective:

To develop a *customer relationship management* plan for a retailer or another type of company or organization in the metaverse. Students are free to identify the type of retailer (say women's fashion or hardware or automobiles) or type of company. The retailer could exist already (like Canadian Tire, Ford or Tesla, say) or could be a hypothetical retailer of your team's invention (say an online vendor of metaverse products for virtual consumption within the metaverse!). You could also focus on a non-retail organization like our own university, for example.

Activities:

Students will undertake activities such as the following to achieve the project objective.

This semester, students will work in groups to conduct a situation analysis/current state assessment of the metaverse (or, more accurately, metaverses), consider the likely evolution of the metaverse in the next 3-5 years, discuss implications for the customer relationship and marketers in a number of areas, and then develop a brief CRM plan for a company in the metaverse.

Students are to submit one final report on this subject as described below:

1. **Project objective**
State what you intend to accomplish or demonstrate by the end of your report.
2. **Background review**
Conduct a literature review to explore background issues and developments in the metaverse. This literature review should include the article mentioned previously and the book, *Ready Player One*. Discuss what the metaverse is and is not, and how it evolved to this point. Organize your research with appropriate headings and sub-headings.
3. **Situation analysis**
Prepare a section of your report to explore the current state of the metaverse organized based on the PESTLE acronym as follows:
 - a. **Political**
Discuss political context for the metaverse. In this case, the political context would seem to be limited so this section can be brief. There is an overlap between the political context and the regulatory environment, however.
 - b. **Economic**
Discuss the economic context of the metaverse. Explore the level of investment that analysts project will be made in the metaverse, current levels of spending by some of the major participants such as Meta, Microsoft and other companies. Discuss how big the metaverse market is projected to be. Be sure to reference all sources fully as endnotes.
 - c. **Social**
Discuss the social context of the metaverse. What does the metaverse allow people to do socially? The metaverse has emerged from social media so discuss the social media context, too. For example, discuss some of the benefits of social media as well as the challenges social media created for society.
 - d. **Technological**
Discuss the technological context of the metaverse including Moore's Law. On what does a successful metaverse depend when it comes to technology? That is, what will technology have to do or resolve, and is current technology presently able to do this?

- e. Legal
What is the legal context for the metaverse? For example, are there new areas of consideration where laws in the physical world translate into the metaverse. One example is how intellectual property and ownership rights for digital property are retained and managed. This discussion could include NFT.
 - f. Environmental
Are there any environmental considerations that that need to be explored for the metaverse? If they are, list them here and discuss them.
4. Future state
- a. Short-term
Consider how the metaverse will likely evolve in the next 2-3 years.
 - i. On-ramp
How will users get into the metaverse?
 - ii. Activities
What will users be able to do when they are in the metaverse?
 - iii. Marketing
How will marketers be able to influence users in the near-term metaverse?
 - b. Medium term
Consider how the metaverse will likely evolve in the 3-5 year time horizon.
 - i. On-ramp
How will users get into the metaverse in the medium-term?
 - ii. Activities
What will users be able to do when they are in the metaverse in the medium-term?
 - iii. Marketing
How will marketers be able to influence users in the medium-term?
5. Metaverse planning
- This section of the report considers how major brands plan or should plan their entry into the metaverse. In your secondary research, you may find help specific companies such as IKEA, McDonald's or Gucci plan their participation in the metaverse. Discuss this here and then go on to consider what factors *any* major consumer brand would need to think about when planning their entry to the metaverse. For example, the starting point for metaverse planning would likely be to establish objectives. How might objectives be categorized and measured? E.g. Objectives might be associated with brand awareness, virtual product sales, integration with the physical world of the brand including non-metaverse sales, and so on. What would the logical next step be when it comes to metaverse planning? Think of what you have learned in the Applied Marketing Management course or other courses you have done for marketing planning and then apply what you have learned selectively here. This should lead you to identify target

market as the next category for metaverse planning. Students can conduct secondary research to look into the metaverse planning of existing companies such as those just mentioned [McDonalds, Gucci and so on], but **no primary research is to be conducted**. For greater clarity, students are NOT to contact companies that have entered the metaverse to understand how they planned their entry. This work is to be done *exclusively* from secondary research supplemented with your own insights. Provide examples for your statements where you can find examples but don't invent your own examples. The examples do not need to be the same ones – you can find different examples to illustrate different points. The following is a suggested start to this section:

a. Objectives

State a menu of options from which companies could frame their metaverse objectives. To illustrate, examples might include brand awareness, virtual product sales, commercial sales when integrating the metaverse with the physical world of the brand, information transfer, customer service, etc. Are there others that you might consider if you were VP Marketing for a major consumer brand?

b. Target market

It would be appropriate for the company to define their target market next. For example, they might want to consider if the target market for metaverse visitors should be different than the companies' core target market in the physical world. If there is a difference, companies would need to reconcile any differences. How might they do this?

c. Now go on to discuss other aspects of metaverse planning that you think a major consumer brand might consider.

6. CRM plan

This section of the document is intended to plan customer relationships and engagement in the metaverse. Apply the IDIC model (as modified), as discussed below:

a. Company description

Identify and describe the company that is the subject of this plan. You can take the position of a company such as a retailer that already has a position in the metaverse (like McDonalds) or you can take the position of a company or institution (like the University) for which you will develop a plan. Simply state for which organization the rest of this section is to be the focus and then make sure the rest of the plan would make sense for such a retailer.

b. Objective

State the objective the company seeks to accomplish in the metaverse in the short-term and medium-term.

c. Precursors

Will the company need to own virtual real estate in order to win in the metaverse? If so, what should it do when it comes to the site location

decision? What other precursors are necessary in order for the company to succeed in the metaverse?

- d. Identify
Describe the target audience for the company in the metaverse and how it will identify its customers. Will it replicate in the metaverse the physical store environment it uses presently and will it sell in much the same way it does now or will it do things differently and if so what and how?
 - e. Differentiate
How will customers be differentiated in the metaverse? Will they be differentiated by value, need and/or influence or in some other way, and if so, how?
 - f. Interact
How will the company interact with its customers in the metaverse? How will it take payment? How would it integrate physical and 3-D worlds? For example, if a customer buys a coat in the metaverse, will the company only sell digital versions or would it also sell physical coats and have them home-delivered?
 - g. Customize
What will the company customize for its customers in the metaverse and what will it not customize?
 - h. Measurement
Discuss how the company will know if its customer relationship management plan is succeeding. What measurements will it undertake?
7. Concluding comments
Summarize the highlights of your report, including your vision for the company's marketing and the main recommendations you have for the company.

Only one long-form written report is expected this semester, the final report. Excluding the cover page, table of contents and appendices, the final report is not to exceed 25 pages. The following is the approximate page allocation to suggest level of detail:

1. Project objective - 0.5 pages
2. Background review – 4-5 pages
3. Situation analysis – 4-5 pages
4. Future state – 3-4 pages
5. Metaverse planning – 3-5 pages
6. CRM plan – 6-8 pages
7. Concluding comments – 1-2 page(s)

DO NOT USE AI WHEN CONDUCTING THIS WORK. If the use of AI is detected – even for a portion of the report, the entire report will be considered as though it were plagiarised. The instructor may require additional presentations from any team as a whole or from individuals within a team where AI may have been used and/or the use of AI is in dispute. These presentations will be used to supplement grading of submissions. Students should pay attention to grammar, spelling, and logic when writing their reports.

The document should be double-checked for typographical errors.

Appendices, cover page and table of contents may add a further 10 pages to the documents so that the total final document will not exceed 35 pages.

Identify the names of team members on the cover page including student numbers and arrange alphabetically by last name.

The final submission should be double spaced, in Arial 12 point font, with 1 inch page margins and, as mentioned, should include a cover page, Table of Contents and appendices of up to 10 pages if necessary. Note that there is a page limit and the number of pages in aggregate should not exceed the total provided above. The page limit is a deliberate decision and is intended to focus the paper.

Papers that are longer than the page limit will receive a penalty of 5% per page.

At the end of the semester, each team will present results of their work in class in a 15 minute presentation.

Hand in long hand paper in soft copy [electronic copy] for grading. Also, hand in your PowerPoint presentation in soft copy using the link in Moodle/eClass before the time stipulated in this Course Outline – and use **MSPowerPoint**. Do not use any other format - not Apple, not Google, not PDF.

Group presentations

Groups will present twice – once informally and then formally, at the end of the semester.

1. The informal presentation will be at class during week 6 when 2-3 members of each group will present “Metaverse Planning” – Section 5 as discussed on pp. 7-8 of this outline. This interim presentation and discussion should be about 10 minutes (do not exceed) and will comprise 5% of the term mark. The presentation should be verbal and informal. No PowerPoint slides are expected as the presentation will be verbal and informal, but the presentation should nevertheless be well structured, carefully considered and thoughtfully delivered without simply reading from notes. Students may use notes to guide their delivery but the presentation should not simply be read. Organize your research carefully even though you are not presenting with slides. (Because slides can sometimes be used as a crutch rather than being informative and illuminating, it is helpful for students to be able to present without visual aids, too).
2. The final presentation will cover the entire report your team will submit and should be structured in the same way as the final report. Each team will have 15 minutes to present so focus on what you did not cover in the interim presentation and be sure to pay attention to the two most important aspects: **how companies should approach metaverse planning, and your company’s CRM plan.** Students should use PowerPoint slides to present this material.

As mentioned, provide the final presentation in MICROSOFT POWERPOINT format via eClass before the time mentioned in this course outline. The instructor will mount the presentation so students can present. **Do not submit in any format other than PowerPoint.** No PDF, Prezi, Keynote, Canva, etc. **Just use PowerPoint.**

Present your material using a professional tone and manner and be crisp and to the point. The presentations do not need to cover everything – just the right things! Prepare your presentations and rehearse 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. Students who provide their views in a thoughtful and comprehensive manner in these online surveys 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. Someone who does no work in the team should not expect to receive a mark either, just as someone who does much less than others should expect to receive a lesser mark, too. Work hard to get along, achieve the project objectives and do what is expected of you – which is what would 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 use content from artificial intelligence (AI), whether copied directly or paraphrased,**
- **do not reuse all or part of 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 hire or ask anyone to do your work,
- 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 and AI, 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 Fall, 2023:

- Fall classes will start on September 4, 2024.
- Reading Week is October 12-18, 2024 for the Fall, 2024 term.
- The course ends on December 3, 2024 for the Fall, 2024 semester.

Detailed course outline

Class/ date	Subject matter	Readings and activities before class [numbers after book authors apply to chapter numbers]	Submissions and activities during class
CI 1 Sep 10	<p><i>Introduction</i></p> <p>Structure of course</p> <p>Mutual expectations</p> <p>CRM definitions</p> <p>Key principles and selected learnings</p>	<p>Obtain books or e-books for Peppers and Rogers (P&R), and Gordon (G)</p> <p>Read: P&R 1 and G 1</p> <p>Complete the Academic Integrity Module</p> <p>Buy course pack from Harvard Case Publishing Services</p> <p>Read: <i>A Framework for CRM</i>, Russell S. Winer, HBR/California Management Review CMR209</p>	<p>No submissions are due</p> <p>Explanation of cases to be handed in for individuals</p>
CI 2 Sep 17	<p>CONDUCT OF DESK RESEARCH FOR TERM PROJECT: BRONFMAN LIBRARIAN</p> <p><i>Customers and relationships</i></p> <p>Tomorrow's customers in Canada</p> <p>Customer loyalty and satisfaction</p> <p>Permission and privacy</p> <p>Contrasting B2B and B2C relationships</p> <p>Relationships with stakeholders in addition to customers</p>	<p>Read: P&R 2 and G 2</p> <p><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</p> <p>Prepare the case: <i>Harrah's Entertainment</i>, Rajiv Lal, Patricia Martone Carrolo HBS 9-502-011</p>	<p>PRESENTATION BY BRONFMAN LIBRARIAN</p> <p>Assignment of individuals to groups. Explanation of term project and related expectations. Students should immediately begin planning and conducting the term project</p> <p>Class discussion of: <i>Harrah's Entertainment</i>, Rajiv Lal, Patricia Martone Carrolo HBS 9-502-011</p> <p>This is an important case as it was one of the first times a company revolutionized an industry based on CRM.</p>
CI 3 Sep 24	<p><i>Customer experience</i></p> <p><i>Planning relationships</i></p> <p>IDIC model</p> <p>CREVITS model</p> <p>The Customer Relationship Cycle</p> <p>Practical issues in CRM planning</p> <p>Trust</p> <p>Avoiding some mistakes</p>	<p>Read: P&R 3,4,5</p> <p>Read: G 3</p> <p><i>Is your company ready for One-to-One Marketing?</i>, Peppers, Rogers, Dorf, HBR 99107</p> <p>Read and prepare case: <i>Social Strategy at Nike</i>. All students are expected to have read and prepared this case.</p>	<p><u>Discussion of term project progress</u></p> <p>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</p>

Class/ date	Subject matter	Readings and activities before class [numbers after book authors apply to chapter numbers]	Submissions and activities during class
	companies make when planning CRM		
CI 4 Oct 1	<p><i>IDIC Model continued</i></p> <p><i>Identifying customers</i></p> <p><i>Differentiating customers</i></p> <p>Differentiating customers by value</p> <p>Differentiating customers by needs</p> <p>Differentiation by customer influence</p> <p>Calculating the cost of CRM</p> <p>Lifetime Customer Value</p> <p>Share of customer</p>	<p>Read: P&R 6, 7</p> <p>Read: <i>CRM Done Right</i>, Rigby & Ledingham, HBR R0411H</p> <p>Read: <i>CRM: Profiting from understanding customer needs</i>, Stringfellow, Nie, Bowen HBS/Business Horizons Article – BH158</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 <u>All students expected to have prepared case, not just the students handing it in. Questions will be asked of students and responses will count towards the class participation component of the grade.</u></p>	<p>For last names that begin A-L, 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>Students should discuss financial considerations in the case and conduct any necessary analysis in support of their assessment.</p> <p>Submission due before 12 noon through Moodle. No late submissions accepted. (No email submissions to course instructor accepted either.)</p> <p>Discussion of the above questions will take place in class.</p>
CI 5 Oct 8	<p><i>Interacting with individual customers</i></p> <p>Communicating with individuals</p> <p>Privacy</p> <p>Golden Questions</p> <p>Real-time engagement</p> <p>Learning relationships</p> <p>Journey mapping</p> <p>Engaging customers: social and mobile</p> <p>Loyalty programs</p> <p>Multichannel marketing communications</p> <p>Privacy and permission</p>	<p>Read: P&R 8, 9</p> <p>Read: <i>The Perfect Message at the Perfect Moment</i>, Kalyanam and Zweben, HBR R0511G</p> <p>Read: <i>E-Loyalty: Your Secret Weapon on the Web</i>, Reichheld, HBR 5181</p> <p>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 <u>All students expected to have prepared case, not just the students handing it in. Questions will be asked of students and responses will count towards the class participation component of the</u></p>	<p>For last names that begin M-O, hand in <i>Privacy Issues and Monetizing Twitter</i></p> <p>Submission due before 12 noon through Moodle. No late submissions accepted. (No email submissions to course instructor accepted either.)</p> <p>Discussion of case will take place in class.</p>

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		<u>grade.</u>	
CI 6 Oct 15	Reading week	No class	
CI 7 Oct 22	<i>Mass customization and personalization</i> <i>Real time and mobile relationships</i> <i>Relationships with social and mobile customers</i> Social media taxonomy and considerations for CRM Engaging the “always connected” customer	Read: P&R 10 Read: G 4,6 Read: <i>Real-time Marketing</i> , Regis McKenna, HBR 95407	<u>Students to present “Metaverse Planning” – Section 5 as discussed on pp. 7-8 of this outline.</u> Each team will have an opportunity to present for up to 10 minutes. No slides are expected. Present verbally without slides but structure the presentation thoughtfully and ahead of time. You may use notes when presenting but don’t simply read from them. Two or three team members can present for the group. <u>Preparation for midterm</u>
CI 8 Oct 29	<p><i>Mid-term examination</i> Exam will be held in class. Comprises multiple choice questions. Content covered in the examination will be all material up to and including Class 6. Exam questions will include material reviewed in class, assigned texts and article readings, and all cases reviewed to date.</p> <p><u>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></p> <p><u>STUDENTS WILL BE PROVIDED WITH A PASSWORD TO TAKE THE EXAM AT THE TIME OF THE EXAMINATION.</u></p> <p><u>Exam is closed book. Students will not be able to access any content on their computer or on the internet during the exam. Students will need to sit with laptop screens visible to the instructor.</u></p>		
CI 9 Nov 5	<i>Customer analytics</i> Customer equity Return on customer Leading indicators of LTV change Database Interactivity Data mining Predictive analytics CRM in the cloud <i>Behavioral insights</i>	Read: P&R 11, 12 Read: G 7, 8, Appendix 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	For last names that begin P-S , 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 Submission due before 12 noon through Moodle. No late submissions accepted. (No email submissions to course instructor accepted either.) Class discussion of assigned readings, esp. <i>Harnessing Behavioral Insights</i> . All students should have read and prepared the

Class/ date	Subject matter	Readings and activities before class [numbers after book authors apply to chapter numbers]	Submissions and activities during class
		<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>	assigned readings.
CI 10 Nov 12	<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. Then complete the case as you would usually do.</p> <p>Submission due before 12 noon through Moodle. No late submissions accepted. (No email submissions to course instructor accepted either.)</p> <p>Discussion of case will take place in class</p>
CI 11 Nov 19	<p><i>Organizing and managing the customer-centric enterprise</i></p> <p>Organizing to create value for individual customers</p> <p>Key trends in CRM's future</p>	<p>Read: P&R 13, 14</p> <p>Read: G 11</p>	<p>Discussion of assigned readings</p> <p>Preparation for final examination</p>

Class/ date	Subject matter	Readings and activities before class [numbers after book authors apply to chapter numbers]	Submissions and activities during class
	Capstone discussion of CRM in today's organizations		
CI 12 Nov 26	Presentations Students present term papers in groups (15 minutes per presentation)		Students hand in long hand reports and presentations in soft copy via Moodle (e-copy) Presentations and reports should be submitted before 12 noon on November 26
CI 13 Dec 3	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> <u>Exam is closed book. Students will not be able to access any content on their computer or on the internet during the exam. Students will need to sit with laptop screens visible to the instructor.</u>	

* 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.