

Course Syllabus

MIS 6378 Advanced ERP CRM – Fall 2014

Contact Information

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Course Description

This course provides graduate students with an in depth review of the concepts, capabilities, and practices of a modern customer relationship management (CRM) system. The course is designed to provide a business context for functional activities and the system interaction required to accomplish those activities.

The course will cover the strategic, operational, analytical, and collaborative competencies of CRM. Classroom discussion will be used to emphasize the strategic aspects of CRM. The instruction of operational CRM will be provided with hands on exercises used to illustrate CRM concepts. Case studies and exercises will be used to illustrate the concepts of CRM analytics. Collaborative CRM will be reviewed as a part of classroom discussion. Integration concepts with other SAP systems will be reviewed as part of the weekly lectures.

Business case study discussion will be a central component of this course.

Learning Outcomes

1. Understand customer relationship management business concepts.
2. Capability to execute transactions in the SAP CRM information system.
3. Ability to perform data mining for customer based analyses.

Course Material:

- 1) "Discover SAP CRM" by Srinu Katta, by Galileo Press, Second Edition, 2008. ISBN: 978-1592298365
- 2) Purchase the case study packet at the following URL
<https://cb.hbsp.harvard.edu/cbmp/access/20503706>
- 3) Download the materials package provided in e-learning.

Assignments & Schedule (expect changes in Schedule - see ELearning for changes to Schedule)

Week	Date	Description
1	August 26 th August 28 th	<p>Syllabus Review. CRM Overview Lecture. Review CRM client & login. Assign Exercise 1 – SAP Navigation. Reading The Age of Customer Capitalism, Harvard Business Review, Roger Martin.</p> <p>Case Study Discussion. Reading A Strategic Framework for Customer Relationship Management, Journal of Marketing, Adrian Payne & Pennie Frow.</p>
2	September 2 nd September 4 th	<p>CRM Overview Lecture. (continued) Reading Discover CRM Chapter 1 & 2. Due Exercise 1 – SAP Navigation. Assign Exercise 2 - SAP Business Partner.</p> <p>Case Study Discussion. Reading ROI for a Customer Relationship Management Initiative at GST, Kellogg School of Management, Mark Jefferey and Robert J. Sweeney.</p>
3	September 9 th September 11 th	<p>CRM Master Data Lecture. CRM Organization Data Lecture. Due Exercise 2 - SAP Business Partner. Assign Exercise 3 - SAP Organization Management. Reading Discover CRM Chapter 11.</p> <p>Case Study Discussion. Reading New Science of Sales Force Productivity, Harvard Business Review; Diane Ledingham, Mark Kovac, and Heidi Locke Simon.</p>
4	September 16 th September 18 th	<p>Customer Interaction Center Lecture. Reading Discover CRM Chapter 6. Due Exercise 3 - SAP Organization Management. Assign Exercise 4 - SAP activity creation exercise.</p> <p>Case Study Discussion. Reading Making the Major Sale, Harvard Business Review, Benson P. Shapiro and Ronald S. Posner.</p>
5	September 23 rd	<p>Sales, and Service Lecture. Reading Discover CRM Chapter 4. Reading Discover CRM Chapter 5. Due Exercise 4 - SAP activity creation exercise. Assign Exercise 5 - SAP Leads exercise.</p>

	September 25 th	Case Study Discussion. Reading Customer Profitability and Customer Relationship Management at RBC Financial Group, Harvard Business School, V.G. Narayanan.
6	September 30 th October 2 nd	Marketing Campaign Planning Lecture. Reading Discover CRM Chapter 3. Due Exercise 5 - SAP Leads exercise. Assign Exercise 6 - SAP opportunity management. Case Study Discussion. Reading The Future Has Been Delivered to Your Mailbox, Entrepreneur Magazine, Jason Myers. Reading How Do Customer Judge Quality in an E-tailer?, MIT Sloan Management Review, Joel E. Collier and Carol E. Bienstock.
7	October 7 th October 9 th	Marketing Campaign Execution Lecture. Reading Kumar Chapter 11 pg. 216-243. Due Exercise 6 - SAP opportunity management. Assign Exercise 7 - SAP Campaign Planning exercise. Case Study Discussion. Reading Finding Your Sweet Spot, Harvard Management Update; Rob Markey, Gerard du Toit, and James Allen.
8	October 14 th October 16 th	Exam review. Due Exercise 7 - SAP Campaign Planning exercise. Midterm Exam.
9	October 21 st October 23 rd	E-Marketing & Sales Lecture. Reading Discover CRM Chapter 7. Assign Exercise 8 – Campaign Execution. Case Study Discussion. Reading Harrah’s Entertainment Inc., Harvard Business School, Rajiv Lal.
10	October 28 th October 30 th	Marketing Analytics Lecture. Reading Discover CRM Chapter 13 pg 297-309. Due Exercise 8 – Campaign Execution. Assign Exercise 9 - SAP Decision Tree Segmentation. Case Study Discussion. Reading Salesforce Management and Measurement, Darden Business Publishing, Eric Larson and Neil Bendle.
11	November 4 th	Sales Analytics Lecture. Reading Discover CRM Chapter 13 pg 311-319.

	November 6 th	<p>Due Exercise 9 - SAP Decision Tree Segmentation. Assign Exercise 10 – Pipeline Management.</p> <p>Case Study Discussion. Reading Stop Customer Churn Before It Starts, Harvard Management Update, Martin Kon.</p>
12	November 11 th November 13 th	<p>Customer Analytics Lecture. Reading Discover CRM Chapter 13 pg 324-327. Due Exercise 10 – Pipeline Management. Assign Exercise 11 - Churn Management.</p> <p>Case Study Discussion. Reading Customer Profitability and Lifetime Value, Harvard Business School, Elie Ofek.</p>
13	November 18 th November 20 st	<p>Customer Lifetime Value Lecture. Due Exercise 11 - Churn Management. Assign Exercise 12 - Customer Lifetime Value.</p> <p>Case Study Discussion. Reading Recommender Systems in E-Commerce, University of Minnesota; J Ben Shafer, Joseph Konstan, and John Riedl.</p>
14	November 25 th November 27 th	<p>Winter Break</p> <p>Winter Break</p>
15	December 2 nd December 4 th	<p>Product Analytics Lecture. Reading Discover CRM Chapter 13 pg 327-330. Due Exercise 12 - Customer Lifetime Value. Assign Exercise 13 - Product Cross Selling.</p> <p>Case Study Discussion. Management, Thunderbird School of Global Management, Lauranne Buchanan & Carolyn J. Simmons.</p>
16	December 9 th December 11 th	<p>Collaborative CRM Lecture. Reading Discover CRM Chapter 9. Due Exercise 13 - Product Cross Selling. Assign Exercise 14 - Partner Channel Management.</p> <p>Case Study Discussion. Reading Competitive Advantage through Channel</p>
17	December 16 th December 18 th	<p>Exam Review. Due Exercise 14 - Partner Channel Management.</p> <p>EXAM 2</p>

Grading Policy

SAP Exercises	35%
Case Study & Quizzes	25%
Exam 1	20%
<u>Exam 2</u>	<u>20%</u>
Total	100%

You must purchase or rent a “clicker” from the bookstore to receive credit for your case studies.

Final letter grade will use the following scale:

	B+ \geq 86.7%	C+ \geq 76.7%	F < 70%	
A \geq 93.4%	B \geq 83.4%	C \geq 73.4%		
A- \geq 90.0%	B- \geq 80.0%	C- \geq 70.0%		

GRADING ENVIRONMENT: This class assumes the student is working in a business environment. All assignments will be graded based upon the appropriateness of the content and presentation. **Students will receive the grades that they earn.** Negotiating for a higher grade personally is not appropriate student behavior and will be routinely denied. Students are encouraged to bring grade calculation issues forward to the professor.

Course & Instructor Policies

e-Learning: All communications for this class will be through eLearning.

SAP Exercise Assignments: Work performed in SAP will be submitted through eLearning on time with no exceptions. Assignments submitted after the deadline will be considered late. **A 25% penalty will be assessed for students submitting assignments past the due date/time. Assignments more than 7 calendar days late are subject to a zero.**

Case Study Assignments: Case studies will be submitted through eLearning on time with no exceptions. Assignments submitted after the deadline will be considered late. **A 25% penalty will be assessed for students submitting assignments past the due date/time. Assignments more than 1 calendar day late are subject to a zero.**

Assignment Submissions: Students are responsible for submitting their assignments with the correct file types in eLearning. **Do not e-mail files to the professor or teaching assistant.** Files that are e-mailed will not be accepted. Do not use web-based tools that create links instead of files. **If incorrect file types are submitted and the due date passes, the student will receive a 25% penalty. Assignments more than 7 calendar days late are subject to a zero.**

Attendance: Your class attendance and class participation is graded in this course. There is no make-up for missed in-class assignments or exams. **A large amount of the content of this course will be covered in class.**

Changes: Changes in assignments or schedules will be posted on e-Learning. It is the student's responsibility to keep up with the changes that are posted on e-Learning.

Text Exam: A picture ID will be required for each student. Please bring a half page Scantron sheet (green, # 882-E) and a #2 pencil for each exam. If you have a time conflict you must notify the instructor in advance at the beginning of the semester for rescheduling consideration.

Missing an exam for any reason other than a medical issue is subject to receiving a zero.

Medical Issues: Instructor will review the impact of medical issues documented by a medical doctor. Colds, flu, and headaches are not acceptable excuses for missing a test or failing to submit an assignment.

WORKING TOGETHER on Individual Assignments: This course will have a considerable number of exercises and case studies. It is acceptable to work together in case study discussions and problem solving with your assignments. **Copying another student's work or having another person do your work is scholastic dishonesty and will be dealt with accordingly. (see below)**

Field Trip Policies

Off-campus Instruction and Course Activities

Off-campus, out-of-state, and foreign instruction and activities are subject to state law and University policies and procedures regarding travel and risk-related activities. Information regarding these rules and regulations may be found at the website address http://www.utdallas.edu/BusinessAffairs/Travel_Risk_Activities.htm. Additional information is available from the office of the school dean. Below is a description of any travel and/or risk-related activity associated with this course.

Student Conduct & Discipline

The University of Texas System and The University of Texas at Dallas have rules and regulations for the orderly and efficient conduct of their business. It is the responsibility of each student and each student organization to be knowledgeable about the rules and regulations which govern student conduct and activities.

The University of Texas at Dallas administers student discipline within the procedures of recognized and established due process. **Procedures are defined and described in the Rules and Regulations of the Board of Regents of the University of Texas System, Part 1, Chapter VI, Section 3, and in Title V, Rules on Student Services and Activities of the Course Syllabus Page 8, University's Handbook of Operating Procedures.** Copies of these rules and regulations are available to students in the Office of the Dean of Students, where staff members are available to assist students in interpreting the rules and regulations (SSB 4.400, 972/883- 6391).

A student at the university neither loses the rights nor escapes the responsibilities of citizenship. He or she is expected to obey federal, state, and local laws as well as the Regents' Rules, university regulations, and administrative rules. Students are subject to discipline for violating the standards of conduct whether such conduct takes place on or off campus, or whether civil or criminal penalties are also imposed for such conduct.

Academic Integrity

The faculty and administration of the School of Management expect from our students a high level of responsibility and academic honesty. Because the value of an academic degree depends upon the absolute integrity of the work done by the student for that degree, it is imperative that a student demonstrate a high standard of individual honor in his or her scholastic work. We want to establish a reputation for the honorable behavior of our graduates, which extends throughout their careers. Both your individual reputation and the school's reputation matter to your success.

The Judicial Affairs website lists examples of academic dishonesty. Dishonesty includes, but is not limited to cheating, plagiarism, collusion, facilitating academic dishonesty, fabrication, failure to contribute to a collaborative project and sabotage. Some of the ways students may engage in academic dishonesty are:

- **Coughing and/or using visual or auditory signals in a test;**
- **Concealing notes on hands, caps, shoes, in pockets or the back of beverage bottle labels;**
- **Writing in blue books prior to an examination;**
- **Writing information on blackboards, desks, or keeping notes on the floor;**
- **Obtaining copies of an exam in advance;**
- **Passing information from an earlier class to a later class;**
- **Leaving information in the bathroom;**
- **Exchanging exams so that neighbors have identical test forms;**
- **Having a substitute take a test and providing falsified identification for the substitute;**
- **Fabricating data for lab assignments;**
- **Changing a graded paper and requesting that it be regraded;**
- **Failing to turn in a test or assignment and later suggesting the faculty member lost the item;**
- **Stealing another student's graded test and affixing one's own name on it;**
- **Recording two answers, one on the test form, one on the answer sheet;**
- **Marking an answer sheet to enable another to see the answer;**
- **Encircling two adjacent answers and claiming to have had the correct answer;**
- **Stealing an exam for someone in another section or for placement in a test file;**
- **Using an electronic device to store test information, or to send or receive answers for a test;**
- **Destroying or removing library materials to gain an academic advantage;**
- **Consulting assignment solutions posted on websites of previous course offerings;**
- **Transferring a computer file from one person's account to another;**
- **Transmitting posted answers for an exam to a student in a testing area via electronic device;**
- **Downloading text from the Internet or other sources without proper attribution;**
- **Citing to false references or findings in research or other academic exercises;**
- **Unauthorized collaborating with another person in preparing academic exercises.**
- **Submitting a substantial portion of the same academic work more than once without written authorization from the instructor.**

<http://www.utdallas.edu/judicialaffairs/UTDJudicialAffairs-Basicexamples.html>

Updated: August, 2011

Plagiarism on written assignments, especially from the web, from portions of papers for other classes, and from any other source is unacceptable. On written assignments, this course will use the resources of turnitin.com, which searches the web for plagiarized content and is over 90% effective.

During tests and quizzes, students in this section are not allowed to have with them any food or drinks, scratch paper, course materials, textbooks, notes, invisible ink pens, or electronic devices, including iPads, iPhones, iPods, MP3 Players, earphones, radios, smart phones, cameras, calculators, multi-function timepieces, or computers. When possible, students should sit in alternating seats, face forward at all times, and remove any clothing which might conceal eye movements, reflect images of another's work, or hide course material for copying. Exam proctors will monitor any communication or signaling between students by talking, whispering, or making sounds, or by using your hands, feet, other body movements, the test paper itself or your writing implement.

Students in this course suspected of academic dishonesty are subject to disciplinary proceedings, and if found responsible, the following minimum sanctions will be applied:

- 1. Homework – Zero for the Assignment**
- 2. Case Write-ups – Zero for the Assignment**
- 3. Quizzes – Zero for the Quiz**
- 4. Presentations – Zero for the Assignment**
- 5. Group Work – Zero for the Assignment for all group members**
- 6. Tests – F for the course**

These sanctions will be administered only after a student has been found officially responsible for academic dishonesty, either through waiving their right for a disciplinary hearing, or being declared responsible after a hearing administered by Judicial Affairs and the Dean of Student's Office .

In the event that the student receives a failing grade for the course for academic dishonesty, the student is not allowed to withdraw as a way of preventing the grade from being entered on their record. Where a student receives an F in a course and chooses to take the course over to improve their grade, the original grade of F remains on their transcript, but does not count towards calculation of their GPA.

The School of Management also reserves the right to review a student's disciplinary record, on file with the Dean of Students, as one of the criteria for determining a student's eligibility for a scholarship.

Judicial Affairs Procedures

Under authority delegated by the Dean of Students, a faculty member who has reason to suspect that a student has engaged in academic dishonesty may conduct a conference with the student in compliance with the following procedures:

- (i) the student will be informed that he/she is believed to have committed an act or acts of academic dishonesty in violation of University rules;
- (ii) the student will be presented with any information in the knowledge or possession of the instructor which tends to support the allegation(s) of academic dishonesty;
- (iii) the student will be given an opportunity to present information on his/her behalf;
- (iv) after meeting with the student, the faculty member may choose not to refer the allegation if he/she determines that the allegations are not supported by the evidence; or
- (v) after meeting with the student, the faculty member may refer the allegations to the dean of students along with a referral form and all supporting documentation of the alleged violation. Under separate cover, the faculty member should forward the appropriate grade to be assessed if a student is found to be responsible for academic dishonesty;

- (vi) the faculty member may consult with the dean of students in determining the recommended grade;
- (vii) the faculty member must not impose any independent sanctions upon the student in lieu of a referral to Judicial Affairs;
- (viii) the faculty member may not impose a sanction of suspension or expulsion, but may make this *recommendation* in the referral documentation

If the faculty member chooses not to meet with the student and instead forwards the appropriate documentation directly to the dean of students, they should attempt to inform the student of the allegation and notify the student that the information has been forwarded to the Office of Dean of Students for investigation.

The student, pending a hearing, remains responsible for all academic exercises and syllabus requirements. The student may remain in class if the student's presence in the class does not interfere with the professor's ability to teach the class or the ability of other class members to learn. (See Section 49.07, page V-49-4 for information regarding the removal of a student from class).

Upon receipt of the referral form, class syllabus, and the supporting material/documentation from the faculty member, the dean shall proceed under the guidelines in the *Handbook of Operating Procedures*, Chapter 49, Subchapter C. If the respondent disputes the facts upon which the allegations are based, a fair and impartial disciplinary committee comprised of UTD faculty and students, shall hold a hearing and determine the responsibility of the student. If they find the student in violation of the code of conduct, the dean will then affirm the minimum sanction as provided in the syllabus, and share this information with the student. The dean will review the student's prior disciplinary record and assess additional sanctions where appropriate to the circumstances. The dean will inform the student and the faculty member of their decision.

Email Use

The University of Texas at Dallas recognizes the value and efficiency of communication between faculty/staff and students through electronic mail. At the same time, email raises some issues concerning security and the identity of each individual in an email exchange. The university encourages all official student email correspondence be sent only to a student's U.T. Dallas email address and that faculty and staff consider email from students official only if it originates from a UTD student account. This allows the university to maintain a high degree of confidence in the identity of all individual corresponding and the security of the transmitted information. UTD furnishes each student with a free email account that is to be used in all communication with university personnel. The Department of Information Resources at U.T. Dallas provides a method for students to have their U.T. Dallas mail forwarded to other accounts.

Withdrawal from Class

The administration of this institution has set deadlines for withdrawal of any college-level courses. These dates and times are published in that semester's course catalog. Administration procedures must be followed. It is the student's responsibility to handle withdrawal requirements from any class. In other words, I cannot drop or withdraw any student. You must do the proper paperwork to ensure that you will not receive a final grade of "F" in a course if you choose not to attend the class once you are enrolled.

Student Grievance Procedures

Procedures for student grievances are found in Title V, Rules on Student Services and Activities, of the university's *Handbook of Operating Procedures*.

In attempting to resolve any student grievance regarding grades, evaluations, or other fulfillments of academic responsibility, it is the obligation of the student first to make a serious effort to resolve the matter with the instructor, supervisor, administrator, or committee with whom the grievance originates (hereafter called "the respondent"). Individual faculty members retain primary responsibility for assigning grades and evaluations. If the matter cannot be resolved at that level, the grievance must be submitted in writing to the respondent with a copy of the respondent's School Dean. If the matter is not resolved by the written response provided by the respondent, the student may submit a written appeal to the School Dean. If the grievance is not resolved by the School Dean's decision, the student may make a written appeal to the Dean of Graduate or Undergraduate Education, and the Dean will appoint and convene an Academic Appeals Panel. The decision of the Academic Appeals Panel is final. The results of the academic appeals process will be distributed to all involved parties.

Copies of these rules and regulations are available to students in the Office of the Dean of Students, where staff members are available to assist students in interpreting the rules and regulations.

Incomplete Grade Policy

As per university policy, incomplete grades will be granted only for work unavoidably missed at the semester's end and only if 70% of the course work has been completed. An incomplete grade must be resolved within eight (8) weeks from the first day of the subsequent long semester. If the required work to complete the course and to remove the incomplete grade is not submitted by the specified deadline, the incomplete grade is changed automatically to a grade of **F**.

Disability Services

"If you have a disability that requires accommodations under the American's with Disabilities Act Amendment Act -2008(ADAAA), please present your letter of accommodations from the Office of Student AccessAbility and meet with me as soon as possible so that I can support your success in an informed manner. If you would like to know more about the University of Texas at Dallas, Office of Student AccessAbility, please contact the office at 972-883-2098 or email: studentaccessability@utdallas.edu. Our office is located in the Student Service Building (SSB), suite 3.200.

Essentially, the law requires that colleges and universities make those reasonable adjustments necessary to eliminate discrimination on the basis of disability. For example, it may be necessary to remove classroom prohibitions against tape recorders or animals (in the case of dog guides) for students who are blind. Occasionally an assignment requirement may be substituted (for example, a research paper versus an oral presentation for a student who is hearing impaired). Classes enrolled students with mobility impairments may have to be rescheduled in accessible facilities. The college or university may need to provide special services such as registration, note-taking, or mobility assistance.

It is the student's responsibility to notify his or her professors of the need for such an accommodation. Disability Services provides students with letters to present to faculty members to verify that the student has a disability and needs accommodations. Individuals requiring special accommodation should contact the professor after class or during office hours.

Religious Holy Days

The University of Texas at Dallas will excuse a student from class or other required activities for the travel to and observance of a religious holy day for a religion whose places of worship are exempt from property tax under Section 11.20, Tax Code, Texas Code Annotated.

The student is encouraged to notify the instructor or activity sponsor as soon as possible regarding the absence, preferably in advance of the assignment. The student, so excused, will be allowed to take the exam or complete the assignment within a reasonable time after the absence: a period equal to the length of the absence, up to a maximum of one week. A student who notifies the instructor and completes any missed exam or assignment may not be penalized for the absence. A student who fails to complete the exam or assignment within the prescribed period may receive a failing grade for that exam or assignment.

If a student or an instructor disagrees about the nature of the absence [i.e., for the purpose of observing a religious holy day] or if there is similar disagreement about whether the student has been given a reasonable time to complete any missed assignments or examinations, either the student or the instructor may request a ruling from the chief executive officer of the institution, or his or her designee. The chief executive officer or designee must take into account the legislative intent of TEC 51.911(b), and the student and instructor will abide by the decision of the chief executive officer or designee.

These descriptions and timelines are subject to change at the discretion of the Professor.