



ITSS 4V95.04 CRM with Salesforce

Class Information

Term	Fall 2020
Course Number	ITSS 4V95.04, CRM with Salesforce
Class Meetings	Thursdays 4:00-6:45 pm (US Central Time)
Classroom	Online Class – Remote/Virtual, link provided in Elearning

Instructor Information

Instructors	Dr. Ron Bose, 972-883-4917, ron.bose@utdallas.edu Mr. Riyaz Usman (Infosys), riyaz.usman@utdallas.edu
Email	Please use eLearning for any communication with the instructor or TA.
Online Office Hours	Remote meeting using MS Teams, link provided in Elearning Tuesdays 10:00 am – 11:00 am
TA Information	Mr. Paawan Bothra, pxb190006@utdallas.edu Online Office Hours: Tuesday 3:00 pm – 4:00 pm, link provided in Elearning

Course Modality

Instructional Mode	Remote/Virtual: Synchronous online learning at the day and time of the class. The instructor will deliver instruction from his home or office. Students will attend the course from their home or other location.
Course Platform	The course will be delivered in “Remote Virtual” mode using Microsoft Teams. The links to MS Teams for the class will be posted on eLearning. Please make sure you are able to access and use eLearning and MS Teams effectively.
Asynchronous Learning Guidelines	Please refer to: https://www.utdallas.edu/fall-2020/asynchronous-access-for-fall-2020/

Course Information

Course Description	This course is delivered in partnership with Infosys and Salesforce, two of the world’s top companies in Information Technology. It will help you understand the theory and practice of Customer Relationship Management (CRM) in the modern enterprise and discusses the principles, functions, products, and services of CRM. Classroom assignments and projects will use Salesforce – a leading cloud-based CRM solution and Customer Experience Platform. The course will help you develop an understanding of CRM business functions like Sales, Service, and Marketing along with real-life case studies from CRM implementations for Fortune 500 Clients. You will get extensive hands-on practical experience with the
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	Salesforce platform and prepare yourself for a very active job market for people with strong Salesforce skills.
Course Objectives / Outcomes	<ol style="list-style-type: none"> 1. Students will gain foundational knowledge on the main concepts of Customer Relationship Management (CRM), such as Sales, Service and Marketing. 2. Students will develop hands-on expertise on the Salesforce cloud-based training platform called Trailhead. They will use Trailhead to earn Salesforce “superbadges” which are recognized in the job market as key skills 3. After completing this class, students will have the option to take the Salesforce Certified Administrator exam. This certification is not a requirement for course completion - it is optional.
Prerequisites	None

Course Materials

Salesforce Trailhead Platform (free)	Salesforce Trailhead platform
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Grading Policy

Grading	Exam-1 (9/10/20)	5%																										
	Reports and Dashboards Specialist Superbadge (due 9/24/20)	10%																										
	Business Administration Specialist Superbadge (due 10/8/20)	15%																										
	Exam-2 (10/15/20)	5%																										
	Security Specialist Superbadge (due 10/22/20)	15%																										
	Case Study (due 11/12/20)	20%																										
	Self-learning modules	30%																										
	Total	100%																										
	<table><tr><th>Letter Grade</th><th>Point score</th></tr><tr><td>A</td><td>93-100</td></tr><tr><td>A-</td><td>90-92</td></tr><tr><td>B+</td><td>87-89</td></tr><tr><td>B</td><td>83-86</td></tr><tr><td>B-</td><td>80-82</td></tr><tr><td>C+</td><td>77-79</td></tr><tr><td>C</td><td>73-76</td></tr><tr><td>C-</td><td>70-72</td></tr><tr><td>D+</td><td>67-69</td></tr><tr><td>D</td><td>63-66</td></tr><tr><td>D-</td><td>60-62</td></tr><tr><td>F</td><td>59 & below</td></tr></table>		Letter Grade	Point score	A	93-100	A-	90-92	B+	87-89	B	83-86	B-	80-82	C+	77-79	C	73-76	C-	70-72	D+	67-69	D	63-66	D-	60-62	F	59 & below
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Course and Instructor Policies

Attendance	Attendance during class times (via MS Teams) is extremely important. Students are expected to attend all classes to achieve maximum success. This will give you an opportunity to interact with your professor and your fellow students. Students who fail to participate in class regularly will likely face scholastic difficulty. Attendance will NOT be used as part of grading.
Class Recordings	The instructor may record meetings of this course. Any recordings will be available to all students registered for this class as they are intended to supplement the classroom experience. Students are expected to follow appropriate University policies and maintain the security of passwords used to access recorded lectures. <u>Unless the Office of Student Accessibility has approved the student to record the instruction, students are expressly prohibited from recording any part of this course. Recordings may not be published, reproduced, or shared with those not in the class, or uploaded to other online environments except to implement an approved Office of Student Accessibility accommodation.</u> If the instructor or a UTD school/department/office plans any other uses for the recordings, consent of the students identifiable in the recordings is required prior to such use unless an exception is allowed by law. Failure to comply with these University requirements is a violation of the Student Code of Conduct .
Exams	There will be 2 exams in this course, which will cover the material in the lectures. Each exam will be 30-60 min long and will be administered using Elearning. Grading will be based on your progress and scores on Salesforce Trailhead as well as scores on the case studies and exams.
eLearning	eLearning will be used for class content (e.g., class slides and assignment descriptions) and the recording of grades. Slides will be posted before class is held. Class announcements (e.g., change in assignment dates) will be sent to the student email on record in eLearning. It is the students' responsibility to regularly check eLearning and their UTD email accounts. Please ensure that you have good internet connectivity.
Instructor Response Policy	The instructors will respond to all student inquiries through email within 48 business hours (excluding holidays and weekends).
Assignments	Assignments will be done directly on Salesforce Trailhead. All assignments are due on the specified date. Late assignments will get a score of zero.
Extra Credit	There is no extra credit.
Classroom Conduct	We strongly encourage class discussion, questions, and enthusiasm about the course material. Please engage in class discussions via the chat feature in MS Teams or the eLearning discussion board.
Academic Integrity	The University has policies and discipline procedures regarding academic dishonesty. Detailed information is available on the UTD Judicial Affairs web page. All students are expected to maintain a high level of responsibility with respect to

	academic honesty. Students who violate University rules on academic honesty are subject to disciplinary penalties, including the possibility of failure in the course and/or dismissal from the University. Since such dishonesty harms the individual, all students and the integrity of the University, policies on scholastic dishonesty will be strictly enforced.
Comet Creed	<p><i>This creed was voted on by the UT Dallas student body in 2014. It is a standard that Comets choose to live by and encourage others to do the same:</i></p> <p><i>“As a Comet, I pledge honesty, integrity, and service in all that I do.”</i></p>
University Policies & Procedures	<p>For information regarding general University policies and procedures, please go to http://go.utdallas.edu/syllabus-policies. These policies include the following:</p> <ul style="list-style-type: none">▪ Technical Support▪ Field Trip Policies, Off-Campus Instruction and Course Activities▪ Student Conduct and Discipline▪ Academic Integrity▪ Copyright Notice▪ Email Use▪ Withdrawal from Class▪ Student Grievance Procedures▪ Incomplete Grade Policy▪ Disability Services▪ Religious Holy Days▪ Avoiding Plagiarism▪ Title IX▪ Campus Carry

Course Schedule, Assignments, and Due Dates

Date	Class Topic	Details	Salesforce Trailhead Platform
Aug 20	CRM Overview	<ul style="list-style-type: none"> - Syllabus Overview - Need for CRM - Organization implications including value chain incorporation - CRM Principles, Functions, Products, and Services - Implementation of CRM Technology Solutions - Salesforce Basics & Ecosystem Overview - Get Started with Trailhead 	<p>Module: Trailhead Basics</p> <p>Module: Trailhead Playground Management</p> <p>Module: Salesforce Career Exploration for Students</p> <p>Module: CRM for Lightning Experience</p> <p>Module: Lightning Experience Basics</p>
Aug 27	CRM from a Business Perspective	<ul style="list-style-type: none"> - CRM from a Business Perspective - Importance of Customer Experience in CRM - Platform, Lightning Experience - Salesforce 360 - Product Overview 	<p>Module: Salesforce Platform Basics</p> <p>Project: Quickstart: Lightning App Builder</p> <p>Module: Lightning Experience Customization</p>
Sep 3	CRM Functions: Sales Processes and Strategies	Introduction to sales cloud, managing accounts, developing contacts, managing activities, prospecting leads and tracking opportunities	<p>Project: Customize an Org to Support a New Business Unit</p> <p>Module: Sales Cloud Basics</p> <p>Module: Sales Cloud Rollout Strategy</p> <p>Module: Sales Cloud Configuration Basics</p>

Sep 10	CRM Data Management & Analytics	Managing Salesforce data, Designing and building reports, Introduction to salesforce analytics, data visualization in salesforce using reports and dashboard, overview on Einstein analytics, Marketing, Sales, Service analytics	<p>Module: Data Modeling</p> <p>Module: Data Management</p> <p>Module: Reports & Dashboards for Lightning Experience</p> <p>Project: Create Reports and Dashboards for Sales and Marketing Managers</p> <p>Exam-1</p>
Sep 17	CRM Functions: Service and Support Functions	Understanding salesforce service and support, an overview of case management- Creating a Case, Managing Cases, manipulating and closing cases, automated case management	<p>Module: Service Cloud Basics</p> <p>Module: Service Cloud for Lightning Experience</p> <p>Module: Service Cloud Agent Productivity</p> <p>1st Super badge: Lightning Experience Reports & Dashboards Specialist</p>
Sep 24	CRM Security	Introduction to salesforce data security and user management.	<p>Module: Data Security</p> <p>Module: User Management</p> <p>Module: Identity Basics</p> <p>Module: User Authentication</p>

Oct 1	CRM Functions: Marketing Automation	Introduction to marketing cloud, campaign management and driving demand with campaigns	<p>Module: Marketing Cloud Basics</p> <p>Module: Marketing Cloud Products</p> <p>Module: Pardot Lightning App Basics</p> <p>2nd Super badge: Business Administration Specialist</p>
Oct 8	Career Highlight: Salesforce Consulting	<ul style="list-style-type: none"> - What does a career in consulting look like? - Infosys & Salesforce Guest Lectures 	<p>Module: Salesforce Partner Community</p> <p>Module: Consulting Partner Basics</p> <p>Module: Career Development Planning</p> <p>Module: Public Speaking Skills</p>
Oct 15	CRM Consulting with Salesforce - Intro to Agile & Running Client Discovery	<ul style="list-style-type: none"> - Scrum and Kanban overview - Using Agile in implementation projects 	<p>Module: Salesforce Agile Basics</p> <p>Module: Scrum and Kanban at Salesforce</p> <p>Module: Build an App to Track Your Trailblazer Journey</p> <p>Module: Build your Personal Portfolio on Salesforce</p> <p>3rd Super badge: Security Specialist</p> <p>Exam-2</p>

Oct 22	Hands-on with Infosys - CRM Data Model	Real life Case Study designed to assess students skills and bring real-life scenarios to the class with support from Infosys - Introduction & Kickoff	<p>Case Study: Build your solution by creating custom objects and relationships.</p> <p>Infosys practitioner sharing real-life examples</p> <p>Module: Formulas & Validations</p> <p>Module: Picklist Administration</p> <p>Module: Customize a Salesforce Object</p>
Oct 29	Hands On with Infosys - CRM Customization	Real life Case Study designed to assess students skills and bring real-life scenarios to the class with support from Infosys	<p>Case Study: Build Your First Salesforce App.</p> <p>Infosys practitioner sharing real-life examples</p> <p>Module: Lightning App Builder</p> <p>Module: Salesforce Mobile App Customization</p> <p>Module: Company wide Org Settings</p>
Nov 5	Hands On with Infosys - CRM Business Process Automation	Real life Case Study designed to assess students skills and bring real-life scenarios to the class with support from Infosys	<p>Case Study: Build Your First Business Process Automation.</p> <p>Infosys practitioner sharing real-life examples</p> <p>Module: Lightning Flow</p> <p>Module: User Engagement</p>

Nov 12	Career Event	Career panel and exploration with Infosys	Module: Resume Writing Strategies Module: Interview Strategies Module: Storytelling & Communication
Nov 19	Hands On with Infosys - CRM Implementation for a Fortune 500 Client	Case Study Presentations - Make competitive	Present the business solutions
Nov 26	Thanksgiving Day - No Class		
Dec 3	Open	Prepare for Admin Certification (Optional)	Prep Trailmix & Exam Guide Trailhead for Partners to provide free vouchers