



ITSS 4344: Business Consulting and CRM with Salesforce

Class Information

Term	Fall 2021
Course Number	ITSS 4344, Business Consulting and CRM with Salesforce
Class Meetings	Thursdays 4:00-6:45 pm (US Central Time), 8/26/21-12/2/21
Classroom	JSOM 2.714

Instructor Information

Instructors	Dr. Ron Bose, 972-883-4917, ron.bose@utdallas.edu Sara Eaton, Kelly Wood from Slalom Consulting https://www.slalom.com/home
Email	Please use eLearning for any communication with the instructors or TA.
Instructor Office Hours	JSOM 2.703, Thursdays 3:00–4:00 pm
TA Information	Dhairya Mehta, dxm200007@utdallas.edu Room: JSOM 2.604

Course Modality

Instructional Mode	Traditional classroom
Course Platform	The course may use Microsoft Teams for student meetings and guest speakers as needed. Please ensure you are able to use eLearning and MS Teams effectively.

Course Information

Course Description	<p>This course is delivered in partnership with Slalom Consulting and Salesforce, two of the world's top companies in Information Technology. It will help you understand the theory and practice of Business Consulting and Customer Relationship Management (CRM) in the modern enterprise. Classroom assignments and projects will use the Salesforce Trailhead platform.</p> <p>You will get extensive hands-on practical experience with Salesforce and prepare yourself for a very active job market for people with Salesforce skills.</p>
Course Objectives / Outcomes	<p>Students will:</p> <ul style="list-style-type: none">○ gain foundational knowledge on important concepts in Business Consulting and Customer Relationship Management○ develop hands-on expertise on the Salesforce training platform called Trailhead○ prepare for job opportunities in the Salesforce job ecosystem

Prerequisites	ITSS 3300
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Course Materials

Salesforce Trailhead Platform (free)	Course Trailmix
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Grading Policy

Grading	Peer review feedback	10%																										
	Mid-term exam, online (10/15/21)	10%																										
	Business Administration Specialist Superbadge (due 11/18/21)	15%																										
	Course Trailmix (due 11/18/21)	35%																										
	Team project (due 12/02//21)	30%																										
	Total	100%																										
	<table border="1"> <thead> <tr> <th>Letter Grade</th> <th>Point score</th> </tr> </thead> <tbody> <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> </tbody> </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	Students are expected to attend all classes to achieve maximum success. This will give you an opportunity to interact with guest faculty from Slalom Consulting, your professor and your fellow students. Students who fail to participate in class regularly will likely face scholastic difficulty.
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

	<p>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></p> <p>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.</p>
Exams	There will be one mid-term exam in this course, which will cover the material in the lectures, weekly readings and material on Trailhead. It will be 60 min long and will be administered using Elearning.
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.
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>“As a Comet, I pledge honesty, integrity, and service in all that I do.”</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	Reading, Listening, Doing	Trailmix
Pre-work	CRM Overview	The Salesforce Economy	Get Started with Trailhead Get to Know Salesforce Digital Transformation Salesforce Partner Community Salesforce CRM Salesforce Platform Basics Salesforce User Basics
Week 1 8/26	Introduction to Consulting and Salesforce	Watch: L'Oreal Video Watch: Zac Otero Video Read: Using The Stages of Team Development Read: Fifteen Practical Ways To Improve Your Leadership Communications Skills Read: Project Management 101 Read: Agile Vocabulary	Finding Success with Your Implementation Partner Consultants on AppExchange Public Speaking Skills Story Telling and Communication Fearless Teaming Trust and Influence Culture of Feedback
Week 2 9/2	Consulting Skills, Teamwork & Project Management	Read: Team Building Watch: Agile Explained Read: Retrospective Methods Read: 3 Ls Retrospective Explained Read: User Stories with Examples and Template Read: Tips for Writing User Stories Read: Master Your Requirements Gathering Read: Requirements Documents - Downsized Read: Managing the Products Requirements Definition Process Read: Difference Between Acceptance Criteria and Definition of Done	UX Research Basics UX Personas for Salesforce Lighting Experience Basics Lightning Experience Customization Data Modeling Data Management

<p>Week 3 9/9</p>	<p>Gathering Requirements & Building User Stories</p>	<p>Requirements Gathering for a Birthday Party User Story Example User Story Template Watch: User Story Best Practices Watch: Who Sees What Video Series (9 videos)</p>	<p>Accounts and Contacts for Lightning Experience Leads and Opportunities for Lightning Experience Formulas and Validations Customize a Salesforce Object</p>
<p>Week 4 9/16</p>	<p>Salesforce Fundamentals</p>	<p>Read: Cloud Kicks Project Story Read: How to Run a Great Project Discovery Workshop</p>	<p>Build A Battle Station App Customer-centric Discovery for Salesforce Partners Learn Salesforce Agile Basics Project Management Plan Lite</p>
<p>Week 5 9/23</p>	<p>Project Kickoff and Discovery</p>	<p>Read: Cloud Kicks Project Statement of Work (SOW) Read: Client Discovery Session Guide Read: Backlog Refinement and Sprint Planning: Similarities and Differences Read: Sprint Planning (Atlassian) Read: Agile Estimation and Planning - Scrum Points Explained Task: Meet with your team to choose project roles and responsibilities</p>	<p>Sales Cloud Basics Sales Cloud Configuration Basics Sales Cloud Rollout Strategy Customize a Sales Path for Your Team</p>
<p>Week 6 9/30</p>	<p>Design Workshop and Sprint 1</p>	<p>Watch: Regular Demos- Creating Agile Software Watch: Example of a Demo Read: Preparing for a Client Demo Read: Six Ways to Give Demos that will Blow the Client's Mind Read: Review this Demo Template</p>	<p>User Management Salesforce Licensing Data Security Company-wide Org Settings Customize and Org to Support a New Business Unit</p>

<p>Week 7 10/7</p>	<p>Sprint 1 and Client Demo</p>	<p>Asset: Demo Template and Script Read: The Right Way to Respond to Negative Feedback Read: Five Reasons Why Feedback is Important</p>	<p>Build a Simple Flow Salesforce Flow Build a Discount Approval Process</p>
<p>Week 8 10/14</p>	<p>Retrospective and Reset</p>	<p>Read: Retrospective Methods Read: The Three L's Restrospectives Explained Read: How to Communicate Effectively Over Email at Work Read: The Risk Management Process in Project Management</p>	<p>Create Reports and Dashboards for Sales and Marketing Managers Reports and Dashboards for Lightning Experience</p>
<p>Week 9 10/21</p>	<p>Sprint 2</p>	<p>Activity: Project Risk Scenarios Template: Risk Assessment Task: Continue Sprint 2 Task: Prepare for Sprint 2 Demo</p>	<p>Best Practices for Troubleshooting Project Risk Management for Partners</p>
<p>Week 10 10/28</p>	<p>Sprint 2 and Client Demo</p>	<p>Asset: Demo Template and Script Task: Review feedback from your Sprint 2 demo and include any resulting work into Sprint 3 Task: Start working with your teams on Sprint 3 planning Read: Quality Assurance</p>	<p>Project; Build a Suggestion Box App Project: Build a data Model for a Recruiting App Mobile Strategy Development Salesforce Mobile App Basics Salesforce Mobile App Customization Lightning Experience for Salesforce Mobile App</p>

<p>Week 11 11/4</p>	<p>End User Adoption</p>	<p>Task: Continue building Sprint 3 Task: Prepare for Sprint 3 demo</p>	<p>User Training and Motivation User Adoption Metrics User Engagement Salesforce Adoption Strategies</p>
<p>Week 12 11/11</p>	<p>Sprint 3 and Client Demo Quality Assurance and End User Training</p>	<p>Asset: Demo Template and Script Task: Review and test your build and fix any issues, or bugs, that you find Task: Prepare for end-user training next week Read: Five Best Practices for End user Training</p>	<p>Career Development Planning Build Your Personal Portfolio on Salesforce</p>
<p>Week 13 11/18</p>	<p>Salesforce Career Opportunities</p>	<p>Watch: Seven Presentation Skills Read: What it Takes to Give a Great Presentation Read: Practicing Energy</p>	<p>Build an App to Track your Trailblazer Journey Superbadge: Business Administration Specialist</p>
<p>Nov 26</p>		<p>Fall Break and Thanksgiving - No Class</p>	
<p>Week 14 12/2</p>		<p>Team Presentations</p>	