MIS 6378: CRM with Salesforce

Class Information

Term	Fall 2022
Course Number	MIS 6378, CRM with Salesforce
Class Meetings	Mondays, 4:00-6:45 pm (US Central Time), 8/22/22-12/5/22
Classroom	JSOM 2.106

Instructor Information

Instructors	UTD: Dr. Ron Bose, 972-883-4917, ron.bose@utdallas.edu IBM: Christopher Balian, Girish Ratnam
Email	Please use eLearning for any communication with the instructors or TA.
Instructor Office Hours	JSOM 2.703, Mondays, 3:00–4:00 pm
TA Information	Vikas Pal, vikas.pal@utdallas.edu Office Hours: Thursdays, 3 pm – 5 pm, JSOM 2.604

Course Modality

Instructional Mode	Traditional classroom
Course Platform	The instructor may use Microsoft Teams for student meetings and guest speakers as needed. Normal weekly classes will be face to face and will not use Teams.

Course Information

Course Description	This course 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. The class will be taught in partnership with IBM. You will get extensive hands-on practical experience with Salesforce and prepare yourself for a very active job market for people with Salesforce skills.
Course Objectives / Outcomes	Students will: o gain foundational knowledge on important concepts in Customer Relationship Management (CRM) o Work through case studies on actual use of CRM in different industries o develop hands-on expertise on the Salesforce Trailhead platform o prepare for job opportunities in the Salesforce job ecosystem

Prerequisites	None

Course Materials

Salesforce Trailhead Platform (free)	**Required:** MIS 6378 Course Trailmix **Optional:** Salesforce Administrator Trailmix
Harvard Business Publishing Case Studies (purchased)	**Harvard Coursepack**
Practice Exams for Salesforce Certified Administrator (purchased)	**FocusOnForce: https://focusonforce.com/admin-study-guide/**

Grading Policy

Grading		
	CW 1-12: Self-learning modules	100
	SB1, SB2, Two of the following Superbadges: Business Administration Specialist Lightning Experience Reports & Dashboards Specialist Security Specialist Einstein Analytics Data Preparation Specialist Einstein Analytics and Discovery Insights Specialist Process Automation Specialist Selling with Cloud Sales Specialist Service Cloud Specialist	100
	Exam – Salesforce CRM	100
	IBM Project	100
	CRM Case Study Analysis and Presentations	150
	Peer Review Score	50
	Total	**600**

Letter Grade	Point score
A	540+
B	480-539
C	420-479
F	419 and below

Course and Instructor Policies

Attendance	Students are expected to attend all classes to achieve maximum success. This will give you an opportunity to interact and learn from your professor, invited guests 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 appropriate University policies and maintain the security of passwords used to access recorded lectures. ***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.*** 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 one final exam in this course (100 points max), which will cover the material in the lectures, weekly readings and material on Trailhead. There are no make-up exams. Anyone who passes the Salesforce Certified Administrator exam (administered by Salesforce) by 12/8/22 will automatically get 100 points for their final exam score.
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	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: "As a Comet, I pledge honesty, integrity, and service in all that I do."
University Policies & Procedures	For information regarding general University policies and procedures, please go to http://go.utdallas.edu/syllabus-policies. These policies include the following: ■ 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

Assignments & Academic Calendar

Topics, Reading Assignments, Due Dates, Exam Dates

Date	Class Topic	Details	Student Deliverables
Aug 22	CRM Overview	1. Trailhead Basics 2. Get to know Salesforce 3. Salesforce Platform Basics	**Sep 30, 11:59pm** Complete modules in Trailhead
Aug 29	Salesforce Platform CRM Fundamentals	4. Learn CRM Fundamentals for Lightning Experience	**Sep 30, 11:59pm** Complete modules in Trailhead
Sep 5	Holiday	Labor day Holiday	-
Sep 12	Salesforce Value-Adds	5. Quick Start: Salesforce Connect 6. App Exchange Basics 7. AI for Business	**Sep 30, 11:59pm** Complete modules in Trailhead
Sep 19	Business Context for CRM	8. Learn Drucker School MBA Essentials	**Sep 30, 11:59pm** Complete modules in Trailhead
Sep 26	Salesforce Job Roles	9. Salesforce Career Exploration for Students 10. Salesforce Admin – Quick Look 11. Get Started as a Salesforce Business Analyst 12. Great Management	**Sep 30, 11:59pm** Complete modules in Trailhead
Oct 3	Salesforce Q&A	13. List of Superbadge Options • Business Administration Specialist • Lightning Experience Reports & Dashboards Specialist • Security Specialist • App Customization Specialist • Lightning Experience Specialist • Einstein Analytics Data Preparation Specialist • Einstein Analytics and Discovery Insights Specialist • Process Automation Specialist • Selling with Sales Cloud Specialist • Service Cloud Specialist	**Nov 19, 11:59pm** Complete two superbadges in Trailhead

Oct 10	IBM Case	14. Introduction to IBM Methodology and Case	**Nov 19, 11:59pm** Complete two superbadges in Trailhead
Oct 17	IBM Case	15. IBM Case Playback and Sprint 2 Backlog	**Nov 19, 11:59pm** Complete two superbadges in Trailhead
Oct 24	IBM Case	16. IBM Case Playback and Retrospective	**Nov 1, 11:59pm** Submit Harvard Case Presentation – Video Recording (Group work for 3 submissions) HEC Part A, HEC Part B, HEC Part C **Nov 19, 11:59pm** Complete two superbadges in Trailhead
Oct 31	Harvard Case Review	17. Prep Trailmix & Exam Guide 18. Cases Presentations: HEC Part A,B,C	**Nov 8, 11:59pm** Submit Harvard Case Presentations – Video Recording (Group work for 3 separate submissions) Salesforce Ignite, Jaguar Land Rover, Hubspot **Nov 19, 11:59pm** Complete two superbadges in Trailhead
Nov 7	Harvard Case Review	19. Cases presentations: Salesforce Ignite, Jaguar Land Rover, Hubspot	**Nov 15, 11:59pm** Submit Harvard Cases Presentations – Video Recording (Group work for 2 separate submissions) Bubble, Air Liquide-Airgas Merger **Nov 19, 11:59pm** Complete two superbadges in Trailhead

Nov 14	Harvard Case Review	20. Cases presentations – Bubble, Air Liquide-Airgas Merger	**Nov 22, 11:59pm** Submit Harvard Cases Presentations – Video Recording (Group work for 2 separate submissions) Othellonia, CDK **Nov 19, 11:59pm** Complete two superbadges in Trailhead
Nov 21	Holiday	<u>Thanksgiving Holiday</u>	
Nov 28	Harvard Case Review	21. Cases Presentations – Othellonia, CDK	
Dec 5-8	Quiz/Exam	22. Complete ONE of the following: a) Quiz: Salesforce CRM b) Certification: Salesforce Certified Administrator	**Dec 8, 11:59pm**