



MIS 6378: CRM with Salesforce

Class Information

Term	Spring 2023
Course Number	MIS 6378.001 and MIS 6378.002, CRM with Salesforce
Class Meetings	6378.001 Fridays, 10:00 am - 12:45 pm 01/20/2023 - April 5, 2023 6378.002 Thursdays, 10:00 am - 12:45 pm 01/19/2023 - April 4, 2023
Classroom	Section 001(Friday): JSOM 12.202 Section 002(Thursday): JSOM 2.714

Instructor Information

Instructors	Moyez Thanawalla, 972-489-0006, moyez.thanawalla@utdallas.edu
Email	Please use eLearning for any communication with the instructors or TA.
Instructor Office Hours	Thursday, 9:00am - 10:00am, Rm#3.604
TA Information	Pakshal Shah, PakshalMilan.Shah@utdallas.edu Office Hours:

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. 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: gain foundational knowledge on important concepts in Customer Relationship Management (CRM) Work through case studies on actual use of CRM in different industries develop hands-on expertise on the Salesforce Trailhead platform prepare for job opportunities in the Salesforce job ecosystem

Prerequisites	None
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Course Materials

Salesforce Trailhead Platform (free)	Required: MIS 6378 Course Trailmix Optional: Salesforce Administrator Trailmix
Harvard Business Publishing Case Studies (purchased)	Harvard Coursepack https://hbsp.harvard.edu/import/1022660
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	100										
	Exam – Salesforce CRM	100										
	Project	100										
	CRM Case Study Analysis and Presentations	150										
	Peer Review Score	50										
	Total	600										
	<table border="1" style="margin-left: auto; margin-right: auto;"> <tr> <td></td> <td></td> </tr> <tr> <td>A</td> <td>540+</td> </tr> <tr> <td>B</td> <td>480-539</td> </tr> <tr> <td>C</td> <td>420-479</td> </tr> <tr> <td>F</td> <td>419 and below</td> </tr> </table>				A	540+	B	480-539	C	420-479	F	419 and below
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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
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	<p>guests and your fellow students. Students who fail to participate in class regularly will likely face scholastic difficulty.</p>
Class Recordings	<p>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></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	<p>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.</p> <p>Anyone who passes the Salesforce Certified Administrator exam (administered by Salesforce) prior to the final exam will automatically get 100 points for their final exam score.</p>
eLearning	<p>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.</p>
Instructor Response Policy	<p>The instructors will respond to all student inquiries through email within 48 business hours (excluding holidays and weekends).</p>
Assignments	<p>Assignments will be done directly on Salesforce Trailhead. All assignments are due on the specified date. Late assignments will get a score of zero.</p>
Extra Credit	<p>There is no extra credit.</p>
Classroom Conduct	<p>We strongly encourage class discussion, questions, and enthusiasm about the course material.</p>
Academic Integrity	<p>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.</p>

Comet Creed	<p>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:</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

Assignments & Academic Calendar

Topics, Reading Assignments, Due Dates, Exam Dates

Date	Class Topic	Details	Student Deliverables
Jan 19,20	CRM Overview	<ol style="list-style-type: none"> Trailhead Basics Get to know Salesforce Salesforce Platform Basics 	<p><u>Feb 20, 11:59pm</u></p> <p>Complete modules in Trailhead</p>
Jan 26,27	Salesforce Platform CRM Fundamentals	<ol style="list-style-type: none"> Learn CRM Fundamentals for Lightning Experience 	<p><u>Feb 20, 11:59pm</u></p> <p>Complete modules in Trailhead</p>
Feb 2,3	Salesforce Value-Adds	<ol style="list-style-type: none"> Quick Start: Salesforce Connect App Exchange Basics AI for Business 	<p><u>Feb 20, 11:59pm</u></p> <p>Complete modules in Trailhead</p>
Feb 9,10	Business Context for CRM	<ol style="list-style-type: none"> Learn Drucker School MBA Essentials 	<p><u>Feb 20, 11:59pm</u></p> <p>Complete modules in Trailhead</p>
Feb 16,17	Salesforce Job Roles	<ol style="list-style-type: none"> Salesforce Career Exploration for Students Salesforce Admin – Quick Look Get Started as a Salesforce Business Analyst Great Management 	<p><u>Feb 20, 11:59pm</u></p> <p>Complete modules in Trailhead</p>
Feb 23,24	Salesforce Q&A	<ol style="list-style-type: none"> List of Superbadge Options <ul style="list-style-type: none"> Business Administration Specialist Lightning Experience Reports & Dashboards Specialist Security Specialist 	<p><u>Apr 1, 11:59pm</u></p> <p>Complete two superbadges in Trailhead</p>
Mar 2,3	Case	<ol style="list-style-type: none"> Introduction to Case 	<p><u>Apr 1, 11:59pm</u></p> <p>Complete two superbadges in Trailhead</p>
Mar 9,10	Case	<ol style="list-style-type: none"> Case Playback and Sprint 2 Backlog 	<p><u>Apr 1, 11:59pm</u></p> <p>Complete two superbadges in Trailhead</p>

MIS 6378, Spring 2023

Mar 16,17		Spring Break	
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Mar 23, 24	Class Case	16. Class Case Playback and Retrospective	<p><u>Apr 1, 11:59pm</u></p> <p>Submit Harvard Case Presentation - Video Recording (Group work for 3 submissions)</p> <p>HEC Part A, HEC Part B, HEC Part C</p> <p><u>Apr 1, 11:59pm</u></p> <p>Complete two superbades in Trailhead</p>
Mar 30,31	Harvard Case Review	<p>17. Prep Trailmix & Exam Guide</p> <p>18. Cases Presentations: HEC Part A,B,C</p>	<p><u>Apr 1, 11:59pm</u></p> <p>Submit Harvard Case Presentations - Video Recording (Group work for 3 separate submissions)</p> <p>Salesforce Ignite, Jaguar Land Rover, Hubspot</p> <p><u>Apr 1, 11:59pm</u></p> <p>Complete two superbades in Trailhead</p>
Apr 6,7	Harvard Case Review	19. Cases presentations: Salesforce Ignite, Jaguar Land Rover, Hubspot	<p><u>Apr 1, 11:59pm</u></p> <p>Submit Harvard Cases Presentations - Video Recording (Group work for 2 separate submissions)</p> <p>Bubble, Air Liquide-Airgas Merger</p> <p><u>Apr 1, 11:59pm</u></p> <p>Complete two superbades in Trailhead</p>
Apr 13,14	Harvard Case Review	20. Cases presentations – Bubble, Air Liquide-Airgas Merger	<p><u>Apr 21, 11:59pm</u></p> <p>Submit Harvard Cases Presentations - Video Recording (Group work for 2 separate submissions)</p> <p>Othellonia, CDK</p>

			<u>Apr 14, 11:59pm</u> Complete two superbadges in Trailhead
Apr 20,21	Harvard Case Review	21. Cases Presentations – Othellonia, CDK	
Apr 27,28	Security review		
May 4,5	Discover methods		
May 11,12	Quiz/Exam	22. Quiz: Salesforce CRM	<u>May 11, 12 11:59pm</u>