

**Course** **MKT 4331**  
**Digital Prospecting**

**Department** **Marketing, Jindal School of Business**

**Term** **Spring 2023**

**Meetings** **T/Th 2:30 – 3:45 PM in JSOM 1.110**

---

### **Professor's Contact Information**

---

**Name** **Dr. Howard F. Dover**  
**Office Phone** **972-883-4420**  
**Office Location** **JSOM 13.511**  
**Email Address** **Howard.Dover@utdallas.edu**

---

**Communication Preference** **Grade Discussions:**  
Grading questions are generally best addressed in person during office hours. Due to the confidential nature of the subject, discussion of grades during class, after class, or before class will be discouraged.

*Mon – Friday:*

It is my intention to respond to all student communication by the end of the first business day (by 10:00 P.M.) after the receipt of e-mail messages or E-Learning posts.

*Weekend/Holiday:*

**Response to student communications** Under normal circumstances, I intend to respond to student communication by the end (by 10:00 P.M.) of the first business day after the weekend or holiday.

*These statements represent my intention to provide prompt response to student communication but do not convey any guarantee.*

**Office Hours** Open office hours 1 – 2 PM Th or by appointment

---

### **General Course Information**

---

**Course Description** This course covers the methods and metrics, including the tools and software, that are used to manage existing customers and prospects for new customers using specialized CRM software. Focus is on customer relationship management strategy for the purpose of strategic sales account management and prospecting.

---

**Course Objectives**

1. To develop skill competencies required to perform actions and activities used to develop new business for a firm.
2. To become familiar with the use of industry grade technology (Salesforce, Sales Navigator, etc.) and show competency in using this technology to develop and manage an active campaign.

---

- 
3. To understand how technological innovation and behavioral shift can alter customer journeys and sales processes
  4. Show competency in using tools to manage customer relationships and generate opportunity pipeline
- 

**Required Materials** Sales Innovation Paradox, Howard Dover, PhD, Greenleaf, ISBN: 978-1632996244.  
 Course Pack from Harvard Business Review (link to be provided on e-learning)

**Suggested Texts** Social Selling Mastery by Jamie Shanks, Wiley 2016. ISBN 978-1-119-28073-6

High Profit Prospecting by Mark Hunter, AMA 2017. ISBN 978-0-8144-3776-6

Sales Development Playbook by Trish Bertuzzi, Moore-Lake 2016. ISBN 978-0692622032

Agile Selling by Jill Konrath, Portfolio 2015. ISBN 978-1591847915

---

**Course Statements** The sales education at UT Dallas is nationally recognized and followed by sales professionals from industry. This course is a core curriculum course and involves live selling. Please consider the following:

*Course Attendance:*

It is very unlikely that you will pass this course if you do not attend class sessions. Since there is no text book and we are ‘live selling’ in this course, your attendance is class is expected each class session.

*Homework/Time outside of class:*

Given the live selling assignments in this class, you will be doing substantial work each week outside of class. ***It is expected that you will need to allocate 3 – 5 hours each week outside of class time*** to complete the assigned tasks, activities, and skills development. Historically, students must engage the business community on a weekly basis, throughout the semester, if they would like to pass this class.

---

**Course Policies:**

<b>Grading (credit) Criteria</b>	Case Work	35%
	Coaching to Competency	35%
	ICP Engagement Competency	30%
<b><i>*All case submissions must be submitted via e-learning (Turnitin tool). Students are advised that their work should be original. Non-original scores over 10% (Turnitin) will be immediately referred to academic dishonesty.</i></b>		

<p><b>Case Work (35%)</b></p>	<p><i>Group Case Report (35%)</i></p> <p>Each group will submit a case report according to instructions provided in the first week of class. Students will be given specific instructions for each case at least one week prior to scheduled case discussion. Each case report should include the following sections and information:</p> <ol style="list-style-type: none"> <li>1. Provide a concise summary of your case analysis and findings (don't just restate the facts of the case).</li> <li>2. What are the key problems of this case? (Should only include the problems you intend to address in your analysis)</li> <li>3. Provide several viable alternative options and describe the advantages and disadvantages of each option. (insure that all options are equally defensible and a reasonable choice)</li> <li>4. Make a recommendation from your options and include the following: <ol style="list-style-type: none"> <li>a. Justification for your choice</li> <li>b. Show your plan can be reasonably implemented</li> <li>c. Describe the expected outcomes of your choice (Ex: Return on Investment)</li> </ol> </li> </ol> <p><i>Grading Note: The first case is 50 points, and all groups must complete. I will select the top 3 grades from the other 4 cases. Your team may choose to not submit one case or submit all cases and get the highest 3 out of 4 grades.</i></p>
<p><b>Coaching to Competency (35%)</b></p>	<p>To obtain the indicated outcomes for this course's project, you (personally) will need to consistently perform activities, utilize resources, and develop skills to accomplish your objective. This component of your grade will be determined by accepting and completing goals provided on the Xvoyant and SalesHood platforms. All goals must be accepted (Xvoyant) and be fully completed for credit.</p> <p><i>Activities</i></p> <p>Each week, each individual student will be given goals to complete. These activities will be logged using various software platforms provided in this class.</p> <p><i>Skills</i></p> <p>For activities to be effective, each student will be given skill goals to achieve during the semester on the provided platforms.</p> <p><i>Participation</i></p> <p><b><i>To help you develop professionalism, if you are unable to attend class, it is EXPECTED that you will notify both the professor and the TA about your absence for each day you will not be in class, prior to the start of class (just as you would notify a client that you are unable to attend a meeting). Your participation and communication around this objective will be part of your coachability score.</i></b></p>
<p><b>ICP Engagement Competency (30%)</b></p>	<p><i>ICP Engagement (30% Individual Assignment)</i></p> <p>In this class you will learn to identify, do outreach towards, and engage with Ideal Customer Profile prospects for Center for Professional Sales. There are three ways to be achieve this engagement objective:</p>

1. Lead Attends Sales Leadership Summit
2. Lead Judges a Rookie Preview Session
3. Lead becomes a Sales Accepted Lead to engage with the CPS individually or as a company.
4. Bonus: Alumni attends 10<sup>th</sup> year celebration (May 5).

Points are earned as follows

*Primary Objective: Sales Accepted Lead*

If you stay within an Ideal Customer Profile, your contacts will naturally want to discuss having a deeper engagement with the Center for Professional Sales.

1 SAL Meeting	150 points
2 SAL Meetings	250 points
3 SAL Meetings	300 points
4 SAL Meetings or more	350 points

*Sales Accepted Lead, is a chorus.ai meeting with an Ideal Customer Profile, with a corresponding opportunity opened in Salesforce.com. Please note academic dishonesty section.*

Sales Leadership Summit

1 Qualified ICP Attending	100 points
2 QICP Attending	150 points
3 QICP Attending or more	200 points

*Ideal customer Profile for SLS is, UTD Sales program Alumni, Alumni in Sales role, Sales Executive (Org greater than 25 employees) or Sales Enablement leader.*

Rookie Preview

1 QICP Attending	100 points
2 QICP Attending	125 points
3 QICP Attending or more	150 points

*Ideal Customer Profile for RP Judge is: UTD Alumni in Sales, Sales Manager, Sales Executive, or Sales Enablement Leader.*

Bonus: \*Sales Alumni Attending 10<sup>th</sup> Year celebration Dinner on May 5<sup>th</sup>

1 Alumni attends Dinner	50 points
2 Alumni Attends Dinner	75 points
3 or more attend Dinner	100 points

*For this bonus category, alumni would have taken a sales course at UTD over the past 10 years to qualify for credit.*

Bonus: When the same client participates in at least 2 items listed (SLS, RP, or SAL), then you will be awarded 50 extra points.

## Academic Calendar

Date		
Week 1 Jan 17/19	Topic(s) <ul style="list-style-type: none"> <li>Digital Disruption</li> <li>Syllabus</li> </ul> <i>Reading:</i> The Tech Explosion, Sales Innovation Paradox (SIP Ch 1)	Topic(s) <ul style="list-style-type: none"> <li>The Current State of Sales</li> </ul> <i>Reading:</i> The Potential for Innovation (SIP Ch 2)
Week 2 Jan 24/26	Topics(s) <ul style="list-style-type: none"> <li>History of innovation</li> <li>FAANG-M</li> </ul> <i>Reading:</i> The Modern Evolution of Sales (SIP Ch 3)	Topic(s) <ul style="list-style-type: none"> <li>MarTech</li> <li>SalesTech</li> </ul> <i>Reading:</i> The Modern Evolution of Sales (SIP Ch 3)
Week 3 Jan 31/Feb 2	<b>Campus Closed Due To Winter Storm</b>	
Week 4 Feb 7/*9 Pro-Sales	Topics(s) <ul style="list-style-type: none"> <li>TABS Consumer Market</li> <li>The Buyer's Perspective</li> <li>Case Basics</li> </ul> <i>Reading:</i> The Buyer and Technology (SIP Ch 4)	<b>Pro-Sales Partner Showcase</b>
Week 5 Feb 14/16	Topics(s) <ul style="list-style-type: none"> <li>TABS Seller</li> <li>SalesTech 2.0</li> </ul> <i>Reading:</i> The Seller and Technology (SIP Ch 5)	<b>Case Due: MondoDB</b> <ul style="list-style-type: none"> <li>How to Generate a SAL</li> </ul> <i>Reading:</i> How to shift from Selling Products to Selling Services (HBR-Chung)
Week 6 Feb 21/*23 UTISC	Topics(s) <ul style="list-style-type: none"> <li>What is a Cadence/Sequence</li> <li>Social Selling Basics</li> </ul> <i>Reading:</i> Personalization at Scale (HBR Shriber)	Mark Hunter Guest Lecture High Profile Prospecting <i>Anatomy of a Cold Call &amp; Flip the Script (via SalesHood)</i>
Week 7 Feb 28/Mar 2	Topics(s) <ul style="list-style-type: none"> <li>Define an Ideal Customer profile</li> <li>E-mail Basics</li> </ul>	<b>Case Due: EMC2</b> <i>Reading:</i> Competing on Customer Journeys (HBR Edelman and Singer)
Week 8 Mar 7/9	Topics(s) <ul style="list-style-type: none"> <li>Understanding our customer</li> <li>Business Models</li> </ul> <i>Reading:</i> Technology is Blurring the Line Between Field and Inside Sales	Topics(s) <ul style="list-style-type: none"> <li>Sales Innovation Behavior Shift</li> <li>Challenger</li> </ul> <i>Reading:</i> New Sales Imperative (HBR: Adamson et al). Sales and the Buyer (SIP Ch 6) <b>Win/Loss Huddle</b>
Mar 13-19	<b>Spring Break</b>	
Week 9 Mar 21/23	Topics(s) <ul style="list-style-type: none"> <li>STABS cycle</li> <li>Need for modern methods</li> </ul> <i>Reading:</i> STABS: The Full Cycle (SIP	<b>Case Due: AnswerDash</b> <i>Reading:</i> Traditional B2B Sales and Marketing are Becoming Obsolete (HBR – Adamson)

	Ch 7)	
Week 10 Mar 28/30	Topics(s) <ul style="list-style-type: none"> <li>• Modern Motions</li> <li>• Becoming a Sales Disruptor</li> </ul> <i>Reading:</i> Understanding Modern Motions and Methods (SIP Ch 8) Creating Multipliers (SIP Ch 9)	Topics(s) <ul style="list-style-type: none"> <li>• Context and Relevancy (Role, Personality)</li> </ul> <b>Win/loss Huddle</b>
Week 11 Apr 4/6	<b>Case Due: Zuora</b> <i>Reading:</i> Collaborative Intelligence: How Human and Artificial Intelligence Create Value Along the B2B Sales Funnel (HBR Pacshen et al)	Sales Leadership Summit All day
Week 12 Apr 11/13 AA-ISP	Call Blocks Flip the Script <b>Win/Loss Huddle (SH)</b>	<b>Call Blocks</b> <b>Flip the Script</b>
Week 13 Apr 18/20	<b>Case Due: Hubspot</b> <i>Reading:</i> AI-Powered Marketing (HBR Davenport et al)	<b>Semester Wrap-up and Presentation</b>  <b>Win/Loss Huddle</b>
Week 14 Apr 25/27	Team Presentations 1-5	Call Blocks Final Push for Rookie Preview
Week 15 May 2/4	Team Presentation 6-10	Team Presentations 11-15
May 5	Rookie Preview	

**Schedule is tentative and is subject to change via announcement in class or via other electronic communications.**

### **Academic Honesty and Record Hygiene (Salesforce.com and Chorus.ai)**

In this course we will be using a live database and all that you do will be recorded in actual databases. The data that you enter into these databases will often determine your grade for the week, and the semester. ***Entering fake data, incomplete data, or non-client data into our systems may be reviewed and referred for academic dishonest.*** Examples include, but are not limited to the following:

- 1) Entering a task or activity in Salesforce.com to achieve cadence, but providing no details regarding the e-mail, call, or meeting.
- 2) Entering opportunities at any point to obtain a higher grade (with no meeting or details associated with the account)
- 3) Mislabeling or misusing Chorus.ai.
  - a. All practice meetings on Chorus should be titled, "Practice: Student name and Buyer's name."

- b. All meeting calls with clients should be titled, "Client meeting: Company name and primary contact."
- c. If and when your chorus accidentally records a class or other project meeting not related to this course, you are expected to delete these recordings. The existence of non-sales recordings does not allow for accurate use of AI tools.

Center for professional sales staff and faculty will run reports weekly to reduce this inaccurate use of our databases. We appreciate your care and effort to use these tools professionally and appropriately.

### **UT Dallas Syllabus Policies and Procedures**

The information contained in the following link constitutes the University's policies and procedures segment of the course syllabus.

Please go to <http://go.utdallas.edu/syllabus-policies> for these policies

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