

Course MKT 4331/ENTP 4331
Digital Prospecting

Department Marketing, Jindal School of Business

Term Spring 26

Meetings T/Th 11:30 AM– 12:45 PM JSOM 11.202 Sec 2
T/Th 2:30 – 3:45 PM JSOM 11.206 Sec 1
Th 4-6:45 PM. JSOM 12.222 Sec 3

Professor's Contact Information

Name Dr. Howard F. Dover
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Office Location JSOM 13.511
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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 4:15 – 6 PM Tuesday (end at 5:30 if no sign up)

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 obtain meetings with key leaders within a firm.

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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 targeted outreach.
 3. To develop business acumen and curiosity via engagement with industry leads
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Required Materials Sales Innovation Paradox, Howard Dover, PhD, Greenleaf, ISBN: 978-1632996244.

Revenue Architecture, Jacco Van der Kooij, Winning by Design, ISBN: 978-8218964931

Course Pack from Harvard Business Review (link to be provided on e-learning)

Suggested Texts 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

Is ‘Good Enough’ Good Enough by David Brock, Partner’s in Excellence, 2025, ISBN 978-0997560220.

MISC (Web) Flip the Script Seasons, by Becc Holland

Course Statements Successful completion of this course will:

- 1) Provide the student 40 volunteer hours
- 2) Is an elective for University Sales Center Alliance Sales Certificate
- 3) Is a core course for AI Sales Certificate (offered by CPS)

Course Attendance:

It is very unlikely that you will pass this course if you do not attend class sessions. Since we are ‘live selling’ in this course, your attendance in class is expected each class session.

Homework/Time outside of class:

Given the assignments in this class, you will be doing substantial work each week outside of class. ***It is expected that you will need to allocate 2-3 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:

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| Grading (credit) Criteria | Case Work | 25% |
| | Coaching to Competency | 30% |
| | Business Development Competency | 45% |

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| | <p><i>*All case submissions must be submitted via e-learning (Turnitin tool). See Generative AI Statement.</i></p> |
| <p>Case Work (25%)</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"> 1. Provide a concise summary of your case analysis and findings (don't just restate the facts of the case). 2. What are the key problems of this case? (Should only include the problems you intend to address in your analysis) 3. Provide several viable alternative options and describe the advantages and disadvantages of each option. (ensure that all options are equally defensible and a reasonable choice) 4. Make a recommendation from your options and include the following: <ol style="list-style-type: none"> a. Justification for your choice b. Can your choice be reasonably implemented (timeline, resources needed, both financial and organization, etc.) c. Describe the expected outcomes of your choice (Ex: Return on Investment) <p><i>Grading Note: The first case is 50 points. Subsequent cases will be 100 each.</i></p> |
| <p>Coaching to Competency & Professionalism (30%)</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 as follows:</p> <p><i>Class Attendance & Participation (15%)</i> You are expected to attend each class session to receive full credit. From the past few years of this class, each set of absences leads to confusion and often a corresponding lower score for all assignments.</p> <p><i>Saleshood (and likely Hyperbound) (15%)</i> Most weeks of this course, there will one or more assignments on a learning platform called Saleshood. You may also be assigned to complete role plays with AI avatars to prepare you for outbound cold calls.</p> |
| <p>Business Development Competency (45%)</p> | <p><i>Business Leadership Intelligence Project (30% Individual Assignment)</i></p> <p>We will learn to perform business development (outreach) by conducting in-depth interviews as assigned on the learning platforms in this class.</p> <p>During the semester, we will have different segments to interview using a questioner provided by Partner's in Excellence.</p> <p>Each interview recorded will give the student 40* points considering the following:</p> |

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| | <p>1) Person interviewed is qualified in the target segment in the proper sequence of the semester.</p> <ol style="list-style-type: none"> a. Phase 1: Small Medium Business <ol style="list-style-type: none"> i. below 25 million in revenue ii. in your team’s geographic area (HQ) iii. C-Suite Level (CEO, Founder, Owner, CMO, CRO, CFO, COO, CPO, CIO). b. Phase 2: Mid-Market Business <ol style="list-style-type: none"> i. Between 25 million and 1 billion in Revenue ii. Geographic territory (HQ) iii. C-Suite + Sales Leadership (VP of Sales, Sales Director, Sales Manager, Sales Operations, Sales Enablement) c. Phase 3: Enterprise <ol style="list-style-type: none"> i. Over 1 billion in Revenue ii. Geographic Territory iii. C-Suite + Sales Leadership d. Phase 4: Salespeople <ol style="list-style-type: none"> i. All revenue segments ii. Person is within your geographic territory or is part of a company with HQ in your territory iii. All Sales roles (SDR, LDR, AE, Account Manager, Retail Salesclerk, Cashier, or any other revenue generating customer facing role) <p>2) All interview questions are asked and answered during the interview.</p> <p>3) Interview is recorded and can be viewed on Center’s chorus.ai account.</p> <p>Student may obtain extra credit by performing more than 10 interviews. No more than 400 points can be earned via this exercise.</p> <p><i>*Early Bird Incentive: Each interview that has been loaded onto Chorus.ai, Loaded onto Insight7, and documented in Salesforce.com prior to Spring Break will receive 50 points. (Max bonus: 4 interviews can obtain this bonus).</i></p> <p><i>Final Presentation (15%) (Bonus of 10% of final presentation grade will be given to all championship teams)</i></p> <p>Each class group will present their accomplishments to the rest of the class. They will also present key findings of their development activities. More information will be provided via e-learning or SalesHood.</p> |
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Academic Calendar

| Date | Topic(s) | Topic(s) |
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| Week 1 Aug 20/22 | <ul style="list-style-type: none"> • Why Business Development Matters • Syllabus | <ul style="list-style-type: none"> • Precision & Relevance (Basic Building Blocks of Prospecting) <ul style="list-style-type: none"> ○ List Building ○ Communication Methods ○ Messaging <p><i>Fellow’s Lecture: David Brock, Partner’s in Excellence</i></p> |

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| <p>Week 2 Jan 27/29</p> | <p>Historical Context:</p> <ul style="list-style-type: none"> • The Potential for Innovation (SIP 2) • Post Manic Phase: The end of ZIRP <p><i>Reading:</i> The Tech Explosion, Sales Innovation Paradox (SIP Intro, Ch 1-2)</p> <p><i>SIP:</i> Sales Innovation Paradox (Book)</p> | <p><i>Building Blocks of Prospecting Success</i></p> <ul style="list-style-type: none"> • List Building by Segments • Communication Fundamentals • Messaging Fundamentals <p><i>Tool (ZoomInfo, LinkedIn)</i></p> |
| <p>Week 3 Feb 3/5</p> | <p>Topics(s)</p> <ul style="list-style-type: none"> • The Firm’s Perspective <ul style="list-style-type: none"> ○ Introduction to RA Systems ○ Data Model 1.0 <p><i>Reading:</i> Systems and The Data Model (RA Ch 4 & 6 Portions)</p> <p><i>RA:</i> Revenue Architecture (Book)</p> | <p><i>B-Blocks: Productivity (Vol vs CR)</i></p> <ul style="list-style-type: none"> • Precision <ul style="list-style-type: none"> ○ List Enhancement 1.0 ○ Com Preferences ○ Affiliate/Networks • Relevance <ul style="list-style-type: none"> ○ <i>Tool (Lavender.ai)</i> |
| <p>Week 4 Feb 10/12</p> | <p>Topic(s)</p> <ul style="list-style-type: none"> • Evolution of Sales • Technology Adoption Behavioral Shift (TABS – General) <p><i>Reading:</i> TABS (SIP Ch 3,4)</p> | <p><i>B-Blocks: Messaging</i></p> <ul style="list-style-type: none"> • Basics <p>Case Essentials</p> <p><i>Launch Phase 1 (SMB- Teams formed)</i></p> |
| <p>Week 5 Feb 17/19*</p> | <p>Topics(s)</p> <ul style="list-style-type: none"> • The Buyer’s Perspective <ul style="list-style-type: none"> ○ Buyer TABS ○ JTBD Framework ○ RA Data Model 2.0 <p><i>Reading:</i> (SIP 5, RA 4 and 6)</p> | <p><i>Pro-Sales Event: Corporate Showcase</i></p> |
| <p>Week 6 Feb 24/26</p> | <p>Case: MongoDB (HBS Case)</p> <p><i>Reading: A Chapter, SIP Chapter 8 & 9</i></p> | <p><i>Phase 2 Launch</i></p> |
| <p>Week 7 Mar 3/5</p> | <p>Topics(s) Focal Point Complex</p> <ul style="list-style-type: none"> • SIBS • STABS <p><i>Reading:</i> (SIP Ch 6&7)</p> | <p><i>Intermediate:</i></p> <ul style="list-style-type: none"> • List Building <ul style="list-style-type: none"> ○ Org Chart: More Roles ○ Firmographics (LI Insights) ○ Stage • Com Strategy <ul style="list-style-type: none"> ○ More Targets ○ Different Objectives • Relevance (Messaging) <ul style="list-style-type: none"> ○ Disc Messaging <p><i>Tool (XiQ +)</i></p> |
| <p>Week 8 Mar 10/12</p> | <p>Relevance (CR/Effectiveness)</p> <ul style="list-style-type: none"> • Life of the Firm • JTBD (Intent Data) <p>Revenue Model</p> | <p><i>Phase 3: Launch</i></p> |
| <p>Mar 16-20</p> | <p><i>Spring Break</i></p> | |

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| Week 9 Mar 24/26* NCSM | Roles in Complex Decision Making <ul style="list-style-type: none"> • Challenger Customer • Metrics & Compensation | Coaches Workshop or Guest Lecture |
| Week 10 Mar 31/Apr 2 | Case: Loris | <i>Intermediate:</i> <ul style="list-style-type: none"> • List Build <ul style="list-style-type: none"> ○ ICP (Firmographics, Role, type) ○ Intent • Comm Strategy <ul style="list-style-type: none"> ○ Referrals ○ Pattern interrupt • Messaging <ul style="list-style-type: none"> ○ Seeding with DISC (S Gillum) ○ Tools for relevance Phase 4 Launch |
| Week 11 Apr 7/9* LSU Symposium | Culture & Structure in Decision Making <ul style="list-style-type: none"> • Revenue Model • Firm Culture (2.0 – JOLT Hanks) <i>Reading: RA Chapter 5</i> | <i>CEO Guest Lecture:</i> Spencer Wixom, CEO Brooks Group |
| Week 12 Apr 14/16 | <i>Modern Methods</i> <ul style="list-style-type: none"> • Modern Motions • Multipliers/Disruptors <i>SIP: (Chapters 8 & 9)</i> | The pulse Project: <ul style="list-style-type: none"> • AI Tools to present Insights • Report on your Productivity |
| Week 13 Apr 21/23 | Case: Hubspot <i>(Suggested Date to have all interviews completed and posted on Chorus.ai and Insight7)</i> | Report Ai Workshop: working session in class with coaches and other resources. |
| Week 14 Apr 28/30 | <i>Wrap up:</i> <ul style="list-style-type: none"> • What have we accomplished? • AI Updates (Resume, LinkedIn, etc.) <p style="text-align: center;">Ai Certificate in Sales</p> <i>(Interviews are completed and posted to Chorus.ai and Insight7 by this date)</i> | Team Presentations North Side Teams |
| Week 15 May 5/7 | Team Presentations South Side Teams | Championship Presentations |

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 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) Failure to update salesforce campaigns in a timely manner when interviews are booked and completed.
- 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, interviewee's name, and title."
 - c. 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.

No Commercial use of Software

In this class, you will be given access to various commercial grade software products. The use of these products is restricted to the work you are assigned in this course only. Use of any software outside of this course, including, but not limited to **commercial use** (at your work or job) **may lead to loss of use**. Loss of software use may cause challenges in completing course assignments.

Statement of Generative AI.

The current environment we live in requires us all to adapt and work with new advances in Artificial Intelligence. In this class you will be asked to do a case report to enhance your business acumen and critical thinking skills. These cases provide you and your team with an excellent opportunity to use Generative AI to enhance the depth of your analysis. Please consider the following requests when using A.I. for writing assignments:

- 1) It is expected that you will list the software systems used for analysis and writing for your assignment (including Grammarly) on the reference page. This gives appropriate credit and reduces potential for plagiarism issues.
- 2) It is also appropriate to provide the following items in Appendix, when using AI.
 - a. When using Grammarly, provide the original document prior to Grammarly edits.
 - b. Full transcript of AI for this project: including prompts and responses.
- 3) If you intend to use an AI response, in its entirety or summarization, appropriate credit should be given to the AI tool used as a referenced source. The reference should be cited in text and on the reference page (including a footnote to the prompt in your appendix would be best practice).

It is important to realize the opportunity and limitations of AI use for projects like case studies. Simply having AI do the work is tempting but does not enhance your knowledge nor is that overly honest.

Learning to work with AI in professional ways will serve to enhance your learning experience and your capacity to do good work.

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.