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**Course** MIS 6378.001 Enterprise Systems and CRM (ACCT6338.001)  
**Instructor** Naser Islam  
**Term** Fall 2019  
**Meetings** Tuesday and Thursday 11:30 AM to 12:45 PM.  
Room JSOM 12.218

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**Instructor:** Naser Islam  
**Email:** [naser.islam@utdallas.edu](mailto:naser.islam@utdallas.edu)  
**Phone:** 972-883-5025  
**Office:** JSOM 2.415  
**Office Hours:** 10.30 am – 11.15 am

**Professor Office Hours:** Tuesday  
2:00pm to 3:00pm  
**TA:** Bharathi Muthukrishnan  
[bxm180020@utdallas.edu](mailto:bxm180020@utdallas.edu)  
**TA Office Hours:** Friday 1:30PM to 3:30PM and  
Tuesday 4:00PM to 6:00PM

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### Prerequisites

1. While this course has no pre-requisites nor co-requisites, students without prior Information Technology exposure and/or database exposure will face a steeper learning curve.
  2. An introductory course in information technology covering information systems, internet, technology-enabled business, spreadsheets, databases, digital representation of data, basics of hardware and software, and business processes.
  3. Basic skills in Microsoft Excel – working with tables, formulae, sorting, filtering and charting
  4. Introductory course on statistics.
  5. Students need to carry their comet card for every lecture to mark their attendance.
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### Course Description

MIS 6378 - Enterprise Systems and CRM (3 semester credit hours). This course studies the theory and practice of Customer Relationship Management (CRM) in the modern enterprise. The course explores topics related to strategic customer management, customer analytics, data mining, campaign management, and partner channel management. The course will develop practical skills utilizing the SAP CRM application and Salesforce platform and CRM analytics and provides a deep understanding of strategic, operational, analytical, and collaborative CRM. (3-0)

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### Learning Outcomes:

1. Understand business processes in an enterprise systems and map those data with SAP CRM System.
  2. Student will learn CRM tool on premise (SAP CRM) and in the cloud platform (Salesforce) to analyze enterprise data to understand CRM insight.
  3. Author enterprise dashboards that are used to summarize and visualize customer data in a way that supports insight into trends and “what-if” analysis for CRM in real time.
  4. Student will understand, create and track various marketing campaigns to measure the success rate and automatically provide leads to the sales team.
  5. Students will learn steps involved in development of an enterprise CRM solution in multiple CRM tool from end-to-end perspective.
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**Required Texts & Suggested Materials:**

**Textbook:** SAP CRM- SAP CRM Srinii Katta 4th Edition

**Suggested Material:** Salesforce-Salesforce Cloud

**Course Note:**

All course materials will be made available through eLearning. Lectures are delivered face to face in classroom.

**Technology Proficiency and Hardware & Software Required:**

Students can use their own computers or use lab computers. Most of the SAP software required for the class is Windows based. Specifically, you will be using

- Microsoft Excel and Access
- SAP CRM
- Salesforce Developer Org along with Trailheads

Note: Students need to carry their comet card for every lecture to mark their attendance.

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**Description and Assessment of the Assignments:**

**Homework** – Most homework is computer based. Homework should be turned in to eLearning on time. Grading will be based on completeness, accuracy, and timeliness.

**Case Studies** – Require students to read, assess, compare, and evaluate a real business case. Then they should use the tools they have learned in the class to argue their findings and recommendations in the form of a quantitative report.

**Exams** – Are combination of written, MCQ, and True/False in UTD testing Center. They are based on concepts and not on particular tools.

**Assignment Submission Policies:**

It is the responsibility of the student to make sure case studies and assignment are turned in on time. Make sure you follow the procedures outlined in each assignment or case study (Blackboard submissions).

Late assignment submissions will be subject to a late penalty of 50%. No assignments will be accepted later than **24Hrs** from the due date.

**Additional Policies**

No make-up exams (except for documented medical or family emergencies) will be offered nor will there be any changes made to the Final Exam schedule, except as permitted by university rules. Lecture attendance is not mandatory however it is recommended that students not miss any lecture.

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**Course Schedule, Assignments, and Due Dates**

*This is a tentative class schedule; changes to the schedule will be posted in eLearning.*

WEEK	CONTENT / READINGS	ASSIGNMENTS
Week – 1 08/20 & 08/22	<b>Introduction to course and CRM:</b> Course objectives and outcomes. Introduction to CRM Products and Services, Core CRM Principles	Reading: Lecture slides and other materials in eLearning
Week – 2 08/27 & 08/29	<b>SAP CRM Detailed overview:</b> SAP CRM, Key Components, SAP CRM Marketing, Sales, Service, Analytics, SAP CRM for small, medium and On-demand Solutions <b>Classwork:</b> SAP CRM Web Client UI Exercise	Reading: Chapter 1 & 2 Assignment: None Classwork – 1 (on Thursday)
Week – 3 09/03 & 09/05	<b>SAP CRM Marketing:</b> SAP CRM Marketing Components, Marketing Resource Management, Marketing Planning and Budgeting, Segmentation, List and Campaign management, TPM, Lead Management, ERP Integrations, Marketing Analytics <b>Assignment 1:</b> Understand, plan and perform marketing activities with SAP CRM WebClient UI - Campaign Management and Lead Management <b>Quiz – 1: A subjective test based on material covered thus far</b>	Reading: Chapter 3 Classwork 2: Due 11:00 PM Assignment 1 Due: by 09/10 11:00 PM Classwork – 2: On Thursday, work due at 11:00PM)
Week – 4 09/10 & 09/12	<b>SAP CRM Sales:</b> Accounts and Contact Management, Activity Management, Planning and Forecasting, Territory Management, Opportunity Management, Product Configuration and Pricing, Quotation and Order Management, Billing and Contract Management, Sales Analytics <b>Classwork:</b> SAP CRM Campaign Wizard-Perform a campaign using the Campaign Wizard. Additionally, you will create a Mail Form to promote one of your goods. <b>Assignment 2:</b> Understand, plan and perform sales activities with SAP CRM - Account Management and Activity Management	Reading: Chapter 4 Assignment: 2 Due: by 09/17 11:00 PM
Week – 5 09/17 & 09/19	<b>Master Data:</b> BP Master Data, Product Master Data, Organizational Master Data, Pricing Master Data <b>Assignment 3:</b> Understand, plan and perform sales activities with SAP CRM - Opportunity Management	Reading: Chapter 11 Assignment: 3 Due: by 09/24 11:00 PM
Week – 6 09/24 & 09/26	<b>SAP CRM Service:</b> Discover SAP CRM Service – Installed Base Management, Warranty Management, Contract and Entitlement Management, Resource Planning, Knowledge Management, Case management, Incident management, Service Order and Service Ticket, Complaints and Returns, In-house Repair, Service Analytics, Business Drivers <b>Assignment 4:</b> SAP CRM Service- Understand, plan and perform service activities with SAP CRM <b>Quiz – 2: A subjective test based on material covered thus far</b>	Reading: Chapter 5 Assignment: 4 Due: by 10/01 11:00 PM
Week – 7 10/01 &	<b>No class on 10/01</b>	<b>YOU MUST RESERVE YOUR SEAT 72 HOURS PRIOR TO EXAM TIME</b>

10/03	<b>EXAM – I: Thursday, October 3, 2019 between 10:00 AM – 12:00 PM at the testing center at Synergy Park North (SPN2).</b>	
Week – 8 10/08 & 10/10	<b>SAP CRM Analytics:</b> Introduction to analytics -Marketing Analytics, Sales Analytics, Service Analytics, Customer Analytics, Product Analytics, Interaction Channel Analytics	Reading: Chapter 13
Week – 9 10/15 & 10/17	<b>Introduction to Salesforce:</b> Overview on Salesforce platform, introduction to Salesforce CRM, Overview on lightening experience, introduction to various salesforce clouds and Key Components, CRM from business perspective <b>Classwork:</b> Sign up and set up Sales force account. Navigate and explore salesforce lightening experience <b>Quiz – 3: A subjective test based on material covered thus far</b>	Reading: Salesforce Cloud Classwork – 3: On Thursday, work due at 11:00PM)
Week – 10 10/22 & 10/24	<b>Sales Cloud:</b> Introduction to sales cloud, managing accounts, developing contacts, managing activities, prospecting leads and tracking opportunities <b>Classwork:</b> Creating account and contacts in Salesforce <b>Assignment 5:</b> Understand, plan and perform sales activities with Salesforce CRM- Lead and opportunity management	Reading: Salesforce Cloud Assignment: 5 Due by 10/29 11:00 PM Classwork – 4: On Thursday, work due at 11:00PM)
Week – 11 10/29 & 10/31	<b>Marketing Cloud:</b> Introduction to marketing cloud, campaign management and driving demand with campaigns <b>Assignment 6:</b> Understand, plan and perform marketing activities with salesforce CRM – Campaign Management	Reading: Salesforce Cloud Assignment: 6 Due by 11/05 11:00 PM
Week – 12 11/05 & 11/07	<b>Service Cloud:</b> Understanding salesforce service and support, overview on case management- Creating a Case, Managing Cases, manipulating and closing cases, automated case management <b>Assignment 7:</b> Understand, plan and perform service activities with Salesforce CRM – Case Management <b>Quiz – 4: A subjective test based on material covered thus far</b>	Reading: Salesforce Cloud Assignment: 7 Due by 11/12 11:00 PM
Week – 13 11/12 & 11/14	<b>Analytics on Salesforce:</b> Introduction to salesforce analytics, data visualization in salesforce using reports and dashboard, overview on Einstein analytics, Marketing, Sales, Service analytics <b>Assignment 8:</b> Analyzing Data with Reports, Seeing the Big Picture with Dashboards, Exploring Kanban View	Reading: Salesforce Cloud Assignment: 5 Due by 11/19 11:00 PM Classwork – 5: On Thursday, work due at 11:00PM)
Week 14 11/19	Exam Preparation (11/19 & 11/21) <b>NO CLASS</b>	
<b>Week 15</b>	Fall Break – No Class (11/26 & 11/28)	
Week 16 12/3	<b>EXAM – I: Tuesday, December, 2019 between 10:00 AM – 12:00 PM at the testing center at Synergy Park North (SPN2).</b>	<b>YOU MUST RESERVE YOUR SEAT 72 HOURS PRIOR TO EXAM TIME</b>

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## Assignment Guidelines

- All reading is to be completed before class on the date posted.
- All assignments must be submitted at the beginning of class. Late assignments are **NOT** accepted.
- Written assignments must adhere to the APA style guide of formatting, citing, and referencing.
- Descriptions of assignments will be posted as they are assigned.
- The exams will consist of multiple choice, fill-in-the-blank, and short essay questions. The final exam is not comprehensive. Make-up exams will be in the form of essays.
- No extra credit assignments are available
- General grading criteria can be found in eLearning. Assignment specific grading criteria will be included with the assignment instructions.
- **All assignments will be submitted via eLearning. I do NOT accept assignments via email. If you submit an incorrect assignment or need to resubmit your assignment in eLearning you will be allowed to resubmit as long as it is before the due date. Send me an email 24 hours prior to the due date and I will clear your submission. Upon doing so, you will be able to resubmit.**
- **DO NOT CHEAT and DO NOT PLAGIARIZE.**

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## Grading

This course will feature a mix of activities and written and verbal assignments that may be in class or on campus. Homework will include readings from the text, assignments, and activities that usually require the student to complete some type of task. The instructor will provide detailed instructions as well as the grading criteria for each assignment. Please consult the course schedule for deadlines.

### Grading Scheme

Grade Component	Points
Assignments	24%
Classwork	19%
Pop Quizzes	10%
Attendance & Class Participation	7%
Exams I & II	50%
<b>Total</b>	<b>100%</b>

### Scoring

Final Point Total	Letter Grade
93-100	A
90-92	A-
87-89	B+
83-86	B
80-82	B-
77-79	C+
73-76	C
70-72	C-
67-69	D+
63-66	D
60-62	D-
0-59	F

## Course & Instructor Policies

- **Professional Conduct** - expected at all times from all students.  
Examples of unprofessional conduct includes, but is not limited to:
    - Trying the “game the system”
    - Coming late to class (without good reason)
    - Leaving early from class (without good reason)
    - Talking in class
    - Working on other subjects while in class
    - Using electronic devices for other than the course materials
  - **Make-up Exams** – restricted to documented emergencies with sufficient written proof provided. Make-up exams will be in essay format and content will differ from the regular exams. Since make-up exams will differ in content, no curve fitting may be applied at either the exam level or the semester level.
  - **Extra Credit** – no extra credit assignments are available.
  - **Class Attendance** – required, except for legitimate emergencies. Please be on-time and remain until class is dismissed.
  - **Late Work** – 24 hour grace period to allow for technical problems with assignment submission. After the grace period, reduced by 25 % per 24 hour period. Please do not ask for any extensions or lifting of late penalties, unless it is a documented emergency with sufficient written proof provided.
  - **Instructor Response Policy:**
    - For questions about course material, before contacting the instructor, please follow the following protocol:
      - If in class, ask questions in class so everyone can benefit.
      - If between classes, if possible, wait until the next class to ask questions so everyone can benefit.
      - Come to the office hours (instructor’s or the TA’s) to ask questions.
      - If it’s urgent and/or cannot be done using one of the methods above:
        - First, email the TA with the question
        - Allow 24 hours (not including weekends, nor holidays, nor breaks) for the TA to respond. TA will not be available during breaks.
        - If the TA’s answer does not satisfy you, please forward the email to instructor (Please do not send emails to instructor unless you have tried to resolve it with the TA first)
        - Instructor may save them until the next class and read and answer them at the start of class so everyone can benefit.
    - For personal questions or issues that only pertain to you, please follow the following protocol:
      - Come to instructor’s office hour
      - If it cannot be handled in office hours, please email the instructor
    - Instructor will attempt to reply to all emails within 48 hours, not including weekends, nor holidays, nor breaks. Instructor will not generally be available during breaks.
  - eLearning – will be used for class content and any changes to class content.
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## **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.”

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## **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.

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*The descriptions and timelines contained in this syllabus are subject to change at the discretion of the Professor.*

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