

## Customer Relationship Marketing (CRM) – Spring 2020 Syllabus

**Adjunct Professor:** Sarah Dalton

**Contact Information:** smdb6b@umsl.edu | Cell: 314-580-2052

**Office Hours:** Available in person or on the phone by appointment with 24 hours notice

**Location:** Online & SSB 205

**In Person Meetings (Required Attendance):** 1/21, 2/18, 3/10, 4/14; all times from 6:00PM - 8:30PM

### **Class Introduction and Objectives**

Marketers rely on technology to reach more consumers on more communications channels than ever before. Tech advances have created growth venues for businesses but have also uncovered a need for professionals who understand the intersection between marketing and technology – and how to capitalize on the opportunity.

The marketing technology framework covered in this course includes project management, automation and email, Customer Experience Platforms (CMS), Customer Relationship Management (CRM) systems, E-Commerce, data analytics and internet sources like Google, Facebook and Twitter. We'll cover best-in-class technologies for use in small businesses through enterprises.

*Upon completing this class, students will understand:*

- How marketing and technology can work together to drive revenue, increase campaign results and create efficiencies across all lines of business and sales.
- The cost of implementing marketing technologies and how to successfully approach leadership for resources.
- The top marketing technology case studies and what all professionals can learn from previous projects
- How to immediately apply the marketing technology roadmap and choose the right digital marketing tools to execute successful campaigns.

### **About Your Adjunct Professor: Sarah Dalton, Marketing Director, Nolan & Associates**

Dalton leads Nolan's marketing strategy, customer relationship technologies, and firm communications efforts. Nolan provides Mergers & Acquisitions advisory services for business owners, corporations and private equity groups in all industries across the U.S. Prior to joining Nolan, Dalton worked in digital marketing roles at Edward Jones and Citibank. She earned her MBA with an emphasis in Marketing from the University of Missouri-St. Louis (UMSL) and her bachelor's degree in Business Administration, Marketing from Truman State University. Dalton previously taught in the UMSL College of Business, covering social media marketing.

### **Class Materials**

1. Text: *Customer Relationship Management: Concept, Strategy, and Tools*; 3rd Edition; V. Kumar and Werner Reinartz; ISBN: 978-3-662-55380-0
2. Access to the internet and to your Hubspot.com and Salesforce.com free accounts for online training within their training portals; we'll setup these accounts in class.

### **How to Succeed in This Course**

I have built this class in a workshop-style, where gaining real experience on real CRM platforms complements book learning, lectures and case study overviews. We will cover the text through lectures and reading assignments to develop a foundation of CRM knowledge, then you will go onto the real CRM platforms to learn more and complete exercises. **Please do note: if you get behind on watching the lectures and reading the text, you will greatly struggle on the exams and in completing the final project. The exams and the final project will be based on your understanding of the text, online course work and the case studies we cover.**

If this is your first online course, it is recommended that you log into Canvas and complete the [Online Course Overview](#) listed in your Canvas course list. If you've already completed the orientation, you do not have to retake it but you can refer to it for helpful videos and tutorials about the technologies used in this course.

### **HubSpot and Salesforce.com Work**

For HubSpot, we will all complete the following certifications, regardless of your level:

- *HubSpot Inbound Certification* | 1:54 Hours
- *HubSpot Marketing Software Certification* | 4:09 Hours
- *HubSpot Sales Software Certification* | 1:08 Hours

For Salesforce, you will complete a Trailmix that is relevant to your level:

**Graduate Students -or- Undergraduates can complete one of the following Trailmixes:**

- *Getting Started for Marketing Majors* | 8:20 Hours

**Additionally, Undergraduates *only* can instead choose to complete this Trailmixes:**

- *Getting Started for Business Majors* | 5:55 Hours

### **Weekly Module Schedule**

<b>Module: Week</b>	<b>Lecture and Assigned Reading</b>	<b>Assigned Online Activities</b>
<b>M1: 1/19</b>	<b>In person on 1/21 from 6:00PM - 8:30PM in SSB 205</b> Syllabus Overview & Marketing 101 Setup your HubSpot.com free account	HubSpot Inbound Certification worktime
<b>M2: 1/26</b>	Chapter 1: Strategic CRM Today	<b>HubSpot Inbound Certification due Sat. at midnight; update your LinkedIn</b>
<b>M3: 2/2</b>	Chapter 2: Concepts of Customer Value Chapter 3: Strategic CRM	HubSpot Marketing Software Certification worktime
<b>M4: 2/9</b>	Chapter 4: Implementing the CRM Strategy Email, Marketing and Service Lectures	HubSpot Marketing Software Certification worktime
<b>M5: 2/16</b>	<b>In person on 2/18 from 6:00PM - 8:30PM in SSB 205</b> CRM Guest Speaker	Post a 10-15 sentence discussion board on what you learned from the guest speaker(s) that includes links to 2 job postings you find on LinkedIn, Indeed.com, etc. that are relevant to this course. The job postings can be global. <b>HubSpot Marketing Software Certification due Sat. at midnight; update your LinkedIn</b>
<b>M6: 2/23</b>	Chapter 5: Customer Analytics Chapter 6: Customer Analytics II	HubSpot Sales Software Certification worktime
<b>M7: 3/1</b>	Chapter 7: Data Mining Chapter 8: Using Databases	Exam 1 Review Guide <b>HubSpot Sales Software Certification due Sat. at midnight; update your LinkedIn</b>
<b>M8: 3/8</b>	<b>In person on 3/10 from 6:00PM - 8:30PM in SSB 205</b> Introduction to CRM Project Setup your Salesforce.com free account	<b>Exam 1: Chapters 1-8; exam opens 3/7 at 8am and closes 3/14 at Midnight</b>

<b>M9: 3/15</b>	Chapter 9: Software Tools and Dashboards Chapter 10: Loyalty Programs: Design and Effectiveness	CRM Project Work Time <b>Salesforce Trailmix work time</b>
<b>M10: 3/22</b>	Chapter 11: Campaign Management Chapter 12: Impact of CRM on Marketing Channels	CRM Project Work Time <b>Salesforce Trailmix work time</b>
<b>3/29: UMSL Spring Break - OFF WEEK</b>		
<b>M11: 4/5</b>	Chapter 14: Customer Privacy Concerns and Privacy Protective Responses Chapter 15: CRM in Social Media	CRM Project Work Time <b>Salesforce Trailmix work time</b>
<b>M12: 4/12</b>	<b>In Person on 4/14 from 6:00PM - 8:30PM in SSB 205</b> CRM Project due in class; executive summary presentations	<b>Salesforce Trailmix due Sat. at midnight; update your LinkedIn</b>
<b>M13: 4/19</b>	Chapter 13: CRM Issues in the B2B context Chapter 18: Future of CRM	Complete Exam 2 Review Guide
<b>M14: 4/26</b>	<b>Exam #2: Chapters 9-18; exam opens 4/19 at 8am and closes <u>Thurs.</u> 4/30 at midnight. Final grades posted Fri., May 1; contact with issues no later than Sun., May 3 at NOON.</b>	

### Class Scoring

Assignment	Points Possible
<b>Exams (300 points, 30% of total)</b>	
• Exam #1	<b>150 points</b>
• Exam #2	<b>150 points</b>
<b>Online Work in HubSpot and Salesforce (500 points, 50% of total)</b>	
• HubSpot Inbound Certification	<b>75 points</b>
• HubSpot Marketing Software Certification	<b>150 points</b>
• HubSpot Sales Software Certification	<b>75 points</b>
• Salesforce Trailmix Completed	<b>200 points</b>
<b>Discussion Board (50 points, 5% of total)</b>	
• Careers Reflection Posting & Response to 1 Student	<b>50 points</b>
<b>Individual Project (150 points, 15% of total)</b>	

• <i>Executive Summary Presentation</i>	<b>150 points</b>
<b>Total Points Possible</b>	<b>1,000 points</b>

### **Grading Scale**

The UMSL Grading System is based on a four-point scale. The grade value for each letter grade is as follows:

A = >93%	C+ = 77-79%	D- = 60-62%
A- = 90 – 93%	C = 73-76%	F = <59%
B+ = 87-89%	C- = 70-72%	EX = Excused
B = 83-86%	D+ = 67-69%	DL = Delayed
B- = 80-82%	D = 63-66%	FN = Failure/Non Participation

**Exams:** Both exams will be multiple choice and taken online. You will have a 90-minute time limit on each exam. The exam must be completed in one sitting, so please plan accordingly before you start the exam.

### **Access, Disability, Communication**

Students requiring special accommodations should meet with me during office hours so that we can discuss how to meet your needs this semester. Prior to our meeting be sure you have met with someone in Disability Access Services (144 MSC or 314.516.6554).

### **Course Policies**

#### **1. Participation Expectations**

It is vitally important that our classroom environment promote the respectful exchange of ideas. This entails being sensitive to the views and beliefs expressed during discussions whether in class or online. Please speak with me before recording any class activity. It is a violation of University of Missouri policy to distribute such recordings without my authorization and the permission of others who are recorded.

#### **2. Technical Issues**

Please contact me immediately should any technical issues arise and put “URGENT” in your email subject line. This is a new class this semester, so it is likely we will work out a few bugs during the semester. I very much appreciate people who point out issues early and often.

#### **3. Due Dates/Late Work**

All weekly work is due by midnight on Saturday of the week we are currently on. **No late work will be accepted or reviewed by the professor.**

#### **4. Professor Communication**

Please contact me via my UMSL email listed on the syllabus. If you prefer to set up a call or in person meeting, please email me. I will be checking my UMSL email multiple times per day, with the exception of the weekend. Please plan ahead and do not save your questions for the due dates.

#### **5. Academic Integrity/Plagiarism**

Academic dishonesty is a serious offense that may lead to probation, suspension, or dismissal from the University. One form of academic dishonesty is plagiarism – the use of an author's ideas, statements, or approaches without crediting the source. Academic dishonesty also includes such acts as cheating by using any unauthorized sources of information and providing or receiving unauthorized assistance on any form of academic work or engaging in any behavior specifically prohibited by the faculty member (e.g., copying someone else's answers on tests and quizzes). Unauthorized possession or distribution of academic materials

is another type of academic misconduct. It includes the unauthorized use, selling or purchasing of examinations or other academic work, using or stealing another student's work, unauthorized entry or use of material in a computer file, and using information from or possessing exams that an instructor did not authorize for release to students. Falsification is any untruth, either verbal or written, in one's academic work. Facilitation is knowingly assisting another to commit an act of academic misconduct. **Plagiarism, cheating, and falsification are not acceptable.**

All instances of academic dishonesty will be reported to the Office of Academic Affairs who will determine whether you will appear before the Student Conduct Committee for possible administrative sanctions such as dismissal from the university. The instructor will make an academic judgment about the student's grade on that work in this course. The campus process regarding academic dishonesty is described in the "Policies" section of the Academic Affairs website.

## **6. Class Behavior**

Meaningful and constructive dialogue is encouraged in this class and requires a degree of mutual respect, willingness to listen, and tolerance of opposing points of view. Respect for individual differences and alternative viewpoints will be maintained at all times in this class. One's words and use of language should be tempered and within acceptable bounds of civility and decency.

## **7. Title IX Policies**

### **Mandatory Reporting**

Under Title IX, all UMSL faculty, staff, and administrators (with limited exception) are obligated to report any incidents of sexual harassment, sexual misconduct, sexual assault, or gender discrimination to the Student Affairs office and/or other University officials. This ensures that all parties are protected from further abuses and that victim(s) are supported by trained counselors and professionals. Note: There are several offices at UMSL whose staff are exempt from Title IX mandated reporting, when the information is learned in the course of a confidential communication (e.g., Counseling Services, Health Services, Community Psychological Service, Center for Trauma Recovery, and Student Social Services).

## **Student Resources**

### **Technical Support**

UMSL provides students with a variety of technology supports on campus. The information listed below connects you with the most commonly sought supports. If you are having difficulty with a technology tool in Canvas (Voicethread, Kaltura, etc.) explore these websites with more information about each toolset:

- Learning Resource Lab: <http://www.umsl.edu/technology/lr/>
- Center for Teaching and Learning: <http://www.umsl.edu/ctl/>
- VoiceThread Support: [pro-support@voicethread.com](mailto:pro-support@voicethread.com) or <https://voicethread.com/support/howto/Basics/>
- Google Apps for UMSL: <http://www.umsl.edu/technology/google-apps/>

### **Academic Support**

**The Online Writing Center (OWC)** provides free face-to-face as well as online writing consultations. For face-to-face consultations, please make an appointment online at [www.umsl.mywconline.com](http://www.umsl.mywconline.com) or visit 222 SSB. At the portal page, students can send their papers to our tutors, who will read them and send them back with suggestions. We try to respond within 48 hours, but it may take longer, so allow ample time.

On their own, students can also access *Turnitin*, which identifies quoted material in their essays.

- Visit the online Writing Lab course in Canvas to submit your drafts online.
- To find the Writing Lab course, click on Courses - All Courses - Browse More Courses. Locate the Writing Lab and click to join the course and access Turnitin.

## **Tutoring Services**

Academic Support Centers across campus: <https://www.umsl.edu/services/sea/student-resources/academicsupport.html>

**NetTutor:** Online tutoring tool in many subjects is now available through NetTutor. Students can get real-time, personal tutoring via video conference.

**MyConnect:** Provides you with a central location to connect to the support services on campus. MyConnect makes it easy to schedule a meeting with your instructor, advisors or counselors. It can help you manage the steps you need to take to stay on track and meet your educational goals. Log in to your UMSL MyConnect Home page by going to Current Students from the UMSL website. Then, access MyConnect through the [MyGateway Student Portal](#).

**Student Enrichment and Achievement** offers assistance tailored to specific student needs.

- 107 Lucas Hall, Phone: (314) 516-5300
- Email: [umslsea@umsl.edu](mailto:umslsea@umsl.edu), <http://www.umsl.edu/services/sea>