IS 396
Fundamentals of Customer Relationship Management (CRM)

Autumn 2021 Syllabus

Instructor
Seth J. Kinnett

Email: skinnett@depaul.edu
Office Hours: zoom by appointment, scheduled via email

Course Meeting
CDM 200 or
asynchronous online

Preparation
One graduate course in information systems or project management (e.g. IS 421, PM 430) and basic familiarity with database concepts are prerequisites for this course.

Course Textbook
How to Win at CRM: Strategy, Implementation, Management. Kinnett, Seth J. CRC Press, 2017, ISBN: 978-1498714709

Course Overview
This course examines the context, business drivers, strategy, implementation, administration, and support of a customer relationship management (CRM) platform. Students will learn common business needs that prompt organizations to implement CRM, along with day-to-day considerations for using and administering a CRM platform. Each class will focus on specific CRM strategy or implementation elements including business problem & solution mapping, user setup, data & security models, process automation, troubleshooting, reports & dashboards, and email templates. Best practices for CRM governance, support, and adoption will also be explored.

Course Objectives
By the end of the quarter, students will be able to:
- Explain the concept of customer relationship management and the core business context and drivers for CRM technology
- Describe the functional composition of a platform CRM information system
- Articulate the importance of CRM governance and the impact of organizational culture on CRM success
- List common pitfalls associated with implementing CRM technology and propose solutions to improve system adoption
- Evaluate common business scenarios and recommend technical solutions
- Describe the typical users and business requirements surrounding CRM and align those requirements to standard CRM system functions

- Utilize declarative development to implement basic solutions in a CRM information system

Grade Determination

40%	Assignments
10%	Quizzes
20%	Midterm Exam
30%	Final Exam

Trailhead assignments are a combination of in-class exercises and homework. Assignments are graded in real-time as they are completed. Students will use D2L to submit screenshots of their Trailhead *badges* to demonstrate completion of assigned exercises. The nature of this approach means that each badge is pass/fail. Trailhead's comprehensive feedback gives students guidance on how to ensure they can achieve each badge. We will review the Trailhead platform in depth to ensure students can navigate it easily. Students may consult any Trailhead resource to complete these assignments.

Quizzes exist to provide students opportunities to practice and obtain real-time feedback on the types of questions that will appear on the midterm and final exams. Quizzes can be taken up to five times. The highest quiz score will be counted as long as that score is obtained prior to the subsequent class period. Quizzes are administered in D2L and are due the day class meets. After the due date, quizzes can still be used as practice for the exams, but the ultimate grade of the quiz will not be updated.

The midterm and final exams are closed internet, meaning you **are** permitted to use any notes you've taken throughout the course, but may not search the internet for answers. The midterm exam evaluates the foundations from the first few weeks of the course. The final exam is cumulative with some emphasis on the latter half of the course. The course culminates with the Final Project, an implementation of basic but comprehensive functionality in the Salesforce platform. Note that this is optional for IS 396 students but can be completed for extra credit.

Changes to Syllabus
This syllabus is subject to change as necessary during the quarter. If a change occurs, it will be thoroughly addressed during class, posted under Announcements in D2L and sent via email.

Academic Policies
All students are required to manage their class schedules each term in accordance with the deadlines for enrolling and withdrawing as indicated in the University Academic Calendar. Information on enrollment, withdrawal, grading and incompletes can be found at:
http://www.cdm.depaul.edu/Current%20Students/Pages/PoliciesandProcedures.aspx.

Course Schedule

Week	Topic	Reading	Assignments or Exams Due
1	• Course Overview • CRM Foundations • Introduction to Trailhead • Tour of the application • Classic vs. Lightening	None	None
2	• CRM Users & User Resistance • Data Access & Security	*Kinnett*, 1-2	*Trailhead playground & assigned orientation badges Due*
3	• Day to Day usage & troubleshooting • User segmentation & management • Operational CRM		*Assignment 1 Due*
4	• CRM Everyday • Social CRM • User Adoption	*Kinnett*, 4	*Assignment 2 Due*
5	• Customization and configuration • Midterm Review	*Kinnett*, 10	*Midterm Due <end of week 5>*
6	• Process Automation • Integration	*Kinnett*, 11	
7	• Data Management • User Support & Training	*Kinnett*, 14, 16	*Assignment 3 Due*
8	• Data stewardship • Dashboards & Analytics	*Kinnett*, 15	*Assignment 4 Due*
9	• Extended/post-adoptive usage • Gamification • Superbadge preparation	*Kinnett*, 17-18	Assignment 5 Due
10	• Extending Salesforce • Review for final exam	*Kinnett*, 11 *Kinnett*, 19 (optional)	Assignment 6 Due
11	• Final Exam	None	*Final Exam* *Final Project (due last day of quarter)*

Online Course Evaluations

Evaluations are a way for students to provide valuable feedback regarding their instructor and the course. Detailed feedback will enable the instructor to continuously tailor teaching methods and course content to meet the learning goals of the course and the academic needs of the students. They are a requirement of the course and are key to continue to provide you with the highest quality of teaching. The evaluations are anonymous; the instructor and administration do not track who entered what responses. A program is used to check if the student completed the evaluations, but the evaluation is completely separate from the student's identity. Since 100% participation is our goal, students are sent periodic reminders over three weeks. Students do not receive reminders once they complete the evaluation. Please

see https://resources.depaul.edu/teaching-commons/teaching/Pages/online-teaching-evaluations.aspx for additional information.

Academic Integrity and Plagiarism
This course will be subject to the university's academic integrity policy. All students are expected to abide by the University's Academic Integrity Policy which prohibits cheating and other misconduct in student coursework. Publicly sharing or posting online any prior or current materials from this course (including exam questions or answers), is considered to be providing unauthorized assistance prohibited by the policy. Both students who share/post and students who access or use such materials are considered to be cheating under the Policy and will be subject to sanctions for violations of Academic Integrity.
More information can be found at https://resources.depaul.edu/teaching-commons/teaching/academic-integrity/Pages/default.aspx.

Posting work on online sites, such as Hero
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Incomplete Grades
An incomplete grade is a special, temporary grade that may be assigned by an instructor when unforeseeable circumstances prevent a student from completing course requirements by the end of the term and when otherwise the student had a record of satisfactory progress in the course. All incomplete requests must be approved by the instructor of the course and a CDM Associate Dean. Only exceptions cases will receive such approval. Information about the Incomplete Grades policy can be found at http://www.cdm.depaul.edu/Current%20Students/Pages/Grading-Policies.aspx

COVID-19 Health and Safety Precautions
- Keeping our DePaul community safe is of utmost importance in the pandemic. Students, faculty and staff are expected to (1) wear a mask as required at all times while indoors on campus; (2) refrain from eating and drinking in classrooms; (3) keep current with their COVID-19 vaccinations or exemptions; (4) stay home if sick; (5) participate in any required COVID-19 testing; (6) complete the online Health and Safety Guidelines for Returning to Campus training; and (7) abide by the City of Chicago Emergency Travel Advisory. By doing these things, we are Taking Care of DePaul, Together. The recommendations may change as local, state, and federal guidelines evolve. Students who do not abide by the mask requirement may be subject to the student conduct process and will be referred to the Dean of Students Office. Students who have a medical reason for not complying with any

requirements should register with DePaul's Center for Student with Disabilities (CSD).

- If you need to fix your mask, use the restroom, and so on, you are welcome to leave the class at any time, no need to ask for permission.

Students with Disabilities

- Students who feel they may need an accommodation based on a disability should contact the instructor privately to discuss their specific needs. All discussions will remain confidential.
- To ensure that you receive the most appropriate accommodation based on your needs, contact the instructor as early as possible in the quarter (preferably within the first week of class), and make sure that you have contacted the Center for Students with Disabilities (CSD) at:
Lewis Center 1420, 25 East Jackson Blvd.
Phone number: (312) 362-8002 Fax: (312) 362-6544
TTY: (773) 325-7296