

**MARK 7A44-01**  
**Customer Relationship Management**  
**Mondays 6:00-9:00PM**

<b>Professor:</b>	<b>Carl Herman</b>
<b>Office</b>	<b>MH 398</b>
<b>Zoom Link</b>	<a href="#"><u>Zoom Link</u></a>
<b>Office Hours</b>	<b>M,W 8:00-9:00 AM and by appointment</b>
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*Use Team 4 from Spring 22 as guide for CRM Class Adoption project*

*Required Course Materials*

- Forbes Article: [Why CRM - Forbes](#)
- Harvard Case Packet, Harvard Business On-Line
  - [Harvard Course Pack](#)

**Course Objectives:**

**This is a course about how sales organizations manage customer relationships using a CRM strategy and people, processes and technology.**

- 1) Understand Customer Relationship Management as a strategy, operational systems and processes and analytical tool.
- 2) Understand the potential benefits companies could achieve with a successful CRM deployment
- 3) Understand the possible problems companies must avoid or overcome to achieve that successful deployment
- 4) Understand how the data and knowledge available to an organization who successfully deploys CRM can improve performance.
- 5) Understand how to lead a sales organization to successfully deploy CRM

**Assignments and Classwork**

**Case Briefs - 15 Points**

You are required to write two 1 page (single spaced, double space between paragraphs) case briefs. Your case brief will include a brief summary of the key issues, answers to the questions found in the case and/or on blackboard and your recommendations for the company.

These are due, submitted on blackboard or emailed to [cherman@uh.edu](mailto:cherman@uh.edu), by 8:00 AM the day of the class discussion.

### **The Golf Tournament CRM Adoption Assignment - 30 Points**

In the CRM class that is part of the PES undergraduate sales program students sell players and sponsor products for the semi-annual PES Open golf tournament. They learn and use CRM - Salesforce.com - to manage their sales process. Their grade is based on making their sales quota, and on adopting and using Salesforce.com. Since adoption is critical to the success of Customer Relationship Management in any organization, you will use this perfect laboratory to understand the CRM adoption process.

These PES students began their Salesforce training on January 17th and will be “trained” and released to sell on January 31.

Each Graduate team will be assigned two PES teams. You should schedule a meeting with your students early in the semester to understand their potential to be successful adopters of CRM, or not. During this time you will assess their potential CRM adoption, identify possible obstacles, and schedule any follow up opportunities that you mutually agree to. Be prepared for this meeting. We will discuss this preparation in class 1/24. At least two meetings between the teams is strongly suggested.

Each team will submit a report (Powerpoint) that is a report on the CRM adoption of their two teams. This report should give each student (8) an adoption “grade”. It should identify the cause of effective adoption when that occurs and a diagnosis of poor adoption when that occurs. The report should also provide recommendation for improving adoption for subsequent sales teams (semesters)

The report is due Monday morning 8:00am the last day of class. I will choose two teams to present their report that evening in class.

#### ***Salesforce.com***

- One benefit, challenge and opportunity in this class is your Salesforce.com license. You will use Salesforce.com for the Golf Tournament Adoption assignment. For those of you who have not used Salesforce I suggest you

take the online training Trailmix you will find here: [U of H Sales Program Trailmix](#)

### **CRM Research Project - 30 Points**

The class will study the CRM path taken by Service Corporation International - SCI. SCI began their CRM project in 2015, so they have 6 years of experience and history that is relevant to the learning objectives of this class. Specifically,

- Two teams will be assigned to independently study the first deployment of CRM that did not meet the objectives and ROI expected. This is the period 2015 to Mid 2017.
- Two teams will be assigned to independently study the second deployment of CRM that did meet the objectives and ROI SCI expected. This is the period Mid-2017 through 2019.
- Two teams will be assigned to independently research the 3rd iteration of CRM and future directions for SCI's CRM. This is the period from 2020-2021, and beyond.

This project will require primary research. It is expected that each team will analyze available data and interview two or three SCI team members.

#### **Deliverable**

- During the scheduled class period, each team will deliver a powerpoint, or similar application, presentation that discusses the results and conclusions from their SCI research..
- Submit the presentation on Blackboard or email to [cherman@uh.edu](mailto:cherman@uh.edu) prior to the class day when your team presents

### ***Class Participation - 25 Points***

- An effective class session can only occur if you, your classmates, and I are involved in the learning process. This requires detailed advance preparation from all of us. I expect everyone to be prepared for each class. This course is designed such that we will learn from each other. That means that when we discuss the assigned articles, the pre-class video or any of the Cases I expect you to have prepared to be a part of the discussion whether your team is presenting the topic or not. A significant part of your participation grade is based on this preparation and class engagement.
- Class and case discussions are enhanced by a free and open exchange of ideas. We learn from each other by building off other people's comments and by disagreeing with other people. You should be prepared to defend a position that you take and you should expect others to defend their positions. I encourage you to challenge ideas with which you disagree—remember to *challenge the idea and not the person*. Furthermore, you should expect to be challenged by others—who disagree with your ideas, not you. By defending your ideas you will learn, but

you should also be willing to change your mind. Changing your mind is also a sign of strength. Be aware that for many issues there is no one right answer. I also want to encourage you to be creative in your ideas and show a willingness to take chances.

- Class participation is a critical component of my evaluation of your performance in the class. Participation is based on quality, but some level of quantity is also necessary. Quality participation moves the discussion along and contributes to our collective learning.

### ***Learning Style***

The methods of learning in this course require advance preparation by the students. We will work together to present, discover and share ideas in order to learn more about the issues related to selling products and services and managing ongoing customer relationships. I believe that a variety of pedagogical techniques maximize what we all get from the class. Therefore, the course will use case discussion, lecture, facilitator and student-led discussion, a field project, a research project, Socratic dialogue, (possibly) a field trip, and student presentations to expose key learnings.

### ***Daily Routine***

For most days, I expect class meetings to follow this type of routine:

- Guest Speaker or Case Discussion
- Team Presentation
- Topic Discussion

We will have one 15-20 minute break each evening.

### ***Attendance Policy***

Attendance is expected—in my classes we all learn from each other and your absence will prevent us from learning from you and you learning from us. As noted in the previous section, being absent from class has a significant negative effect on your class participation.

### ***SFA and Communications***

You will all be given a Salesforce.com account to use during the class. This will be an educational opportunity to learn how to use a key component of sales force automation and CRM – and see the cost and benefit to the rep of using it. You will use Salesforce extensively for the Forecasting and the Recruiting/Interviewing assignments.

### ***Grades***

I expect that by this time in your graduate education that you are intrinsically motivated. I also expect that you are taking this course because you genuinely want to learn more about sales, sales leadership and CRM.. Therefore, I do not require any exams in this class.

On the other hand, I believe that we all do what is evaluated and rewarded. I am very interested in learning from you and I think that your colleagues share this interest. If you choose to not actively participate in the class you deny us the ability to learn from your wisdom and experience. To assure that you give as much to the class as you hope to receive from it, I rely on grades (besides the school requires them). I expect to base your grades on the following proportions:

Class participation	25%
SCI Project	30%
Golf Adoption Project	30%
Case Briefs	15%

### **Tentative Schedule – Meaning it will change**

<i>Date</i>	<i>Case or Lecturer</i>	<i>Lecture</i>	<i>Project Support</i>
Jan 24	Course objectives/ Introductions	CRM Overview - Potholes PES Meeting Preparation	<i>Salesforce Login and Adoption &amp; Golf Dashboards</i>
Jan 31	<i>Guest Speaker - Yara Suki</i>	Discuss Forbes and Edinger Articles	<i>SCI Interview Assignments</i>
Feb 7	<i>Quantium Technologies Case</i>	Beyond CRM - Ai, Sales Engagement and Digital Selling	
Feb 14	<i>Guest Speaker - Dave Levitt</i>	SCI Team 1	
Feb 21	<i>Inside Sales.com Case</i>	SCI Team 2, 3 and 4	<i>Meet with Student Golf Teams</i>
Feb 28	<i>Guest Speaker - Bryan Bentley</i>	SCI Team 5 and 6	
Mar 7	<i>Guest - Yara Suki</i>	Golf Adoption - 2 Teams	