



# Business Administration

Course Number:	<b>BUAD 470</b>
Course Title:	<b>CUSTOMER RELATIONSHIP MANAGEMENT</b>
Credits:	3
Calendar Description:	This course provides marketing students with the concepts and analytical tools needed to understand the emerging field of Customer Relationship Management. Students will focus on developing skills in data mining, quantitative analysis and research. Additional areas of focus include procuring new information for decision making, creating a database and accurately reporting findings. Course emphasis is on experiential learning.
Semester and Year:	<b>Winter 2016</b>
Prerequisite(s):	BUAD 210 or BUAD 268
Corequisite(s):	BUAD 336
Prerequisite to:	No
Final Exam:	No
Hours per week:	4
Graduation Requirement:	Elective - BBA, Marketing Specialty area
Substitutable Courses:	No
Transfer Credit:	No
Special Notes:	
Development Date:	April 2007
Revision Date:	March 2009
Chair's Approval:	Signature

**Professors**

Name	Phone number	Office	Email
Stacey Fenwick	762-5445 #4355	Kelowna: B209	<a href="mailto:sfenwick@okanagan.bc.ca">sfenwick@okanagan.bc.ca</a>

**Learning Outcomes**

Upon completion of this course students will be able to

- explain the role CRM plays in business decision making.
- define the problems and opportunities surrounding CRM.
- design a research proposal for collection and analysis of customer information.
- apply the techniques used to date-mine from existing customer information databases.
- collect unbiased, reliable and valid data for a CRM research project.
- analyze both quantitative and qualitative data using statistical software.
- summarize major findings from data mining and research.
- make defensible strategic recommendations for CRM.
- develop organizational and time management skills required for conducting CRM research.

**Course Objectives**

This course will cover the following content:

\*See Course Schedule

**Evaluation Procedure**

Course Work (Participation, Case Studies, Written Assignments, Presentations)	20%
Mid-term Exam	30%
CRM Project:	
Proposal	5%
Project Planning Log Book	10%
Written Report	25%
Oral Presentation	10%
Total	100%

**Notes****Research Expectations of Students**

- Students will be expected at all times to conduct themselves in a professional, confidential and ethical manner as outlined.
- Students will be expected to maintain a current “Project Log Book” to record all individual and group activities undertaken, plans (2 weeks in advance), and the overall process plan of their research using an app such as “HoursTracker”.
- Students will keep their “Project Log Book” current.
- Project records will then be evaluated by the professor. Failure to maintain the “Project Log Book” and to keep well-documented records will be subject to mark penalties and potential removal from the project group and project.
- Exported and printed logbooks will accompany final projects for archiving.

Late assignments will lose 20% on the first day (if handed in after start of class) and each subsequent day late. Late assignments will not be accepted after 3 calendar days.

To pass this course, you must achieve a passing grade average (50%) on the mid-term exam. Missed exams cannot be rescheduled without a medical certificate or other supporting evidence. Inconvenience to the student is not a valid reason for missing scheduled exams.

**Required Texts/Resources**

Customer Relationship Management: Concepts and Technologies, 3<sup>rd</sup> edition  
by Francis Buttle, Stan Maklan  
SBN-13: 978-1138789838  
ISBN-10: 1138789836

**Recommended Text**

The definitive Guide to Social CRM: Maximizing Customer Relationships with Social Media to Gain Market Insights, Customers, and Profits  
by Barton J. Goldenberg  
ISBN-10: 0-13-413390-0  
ISNN-13: 978-0-13-413390-4

**Course Schedule**

Date		Topic	Textbook	Research
Week of:		Classes start week of Jan 4 Mon Feb 8 Family Day and Reading Break Feb 9 to 12 Fri Mar 25 Good Friday Mon Mar 28 Easter Tue Apr 12 Last day of regularly scheduled classes		
Jan	4	Introduction to CRM Understanding Relationships	Ch 1,2	Problem Definitions Determining Objectives, Policies & Procedures
	11	Managing the Customer Lifecycle Managing the Customer Lifecycle – Customer Retention	Ch 3,4	Research Design Proposal Writing
	18	Customer Portfolio Management How to Deliver Customer-experienced Value	Ch 5,6	Questionnaire Design & Screening
	25	Managing customer experience Sales force automation	Ch 7,8	Quantitative Research Methods
Feb	1	Marketing Automation Service Automation	Ch 9,10	Sample Plan, Size
	8 - 12	READING BREAK ( <i>Feb 8 – 12 no classes</i> )		
	15	Developing and Managing Customer-related Data Bases Using Customer-related Data	Ch 11,12	Preparing/Presenting the Research Results
		Planning to Succeed Implementing CRM	Ch 13,14	Data Collection in Field Non-response Error
	22	Review		
Mar	1	Mid-term Exam		
	7	The Future	Ch 15	
	14	Intro to SPSS – Statistical Software		
	21	Intro to R - Statistical Software		
	28	Social CRM		
Apr	4	Presentation to Clients		
	11	Presentation to Clients		
Apr	15 - 23	Final Exam Period (No Final Exam)		

## **SKILLS ACROSS THE BUSINESS CURRICULUM**

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The Okanagan School of Business promotes core skills across the curriculum. These skills include reading, written and oral communications, computers, small business, and academic standards of ethics, honesty and integrity.

## **STUDENT CONDUCT AND ACADEMIC HONESTY**

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### **What is the Disruption of Instructional Activities?**

At Okanagan College (OC), disruption of instructional activities includes student “conduct which interferes with examinations, lectures, seminars, tutorials, group meetings, other related activities, and with students using the study facilities of OC”, as well as conduct that leads to property damage, assault, discrimination, harassment and fraud. Penalties for disruption of instructional activities include a range of sanctions from a warning and/or a failing grade on an assignment, examination or course to suspension from OC.

### **What is Cheating?**

“Cheating includes but is not limited to dishonest or attempted dishonest conduct during tests or examinations in which the use is made of books, notes, diagrams or other aids excluding those authorized by the examiner. It includes communicating with others for the purpose of obtaining information, copying from the work of others and purposely exposing or conveying information to other students who are taking the test or examination.”

Students must submit independently written work. Students may not write joint or collaborative assignments with other students unless the instructor approves it in advance as a group/team project. Students who share their work with other students are equally involved in cheating.

### **What is Plagiarism?**

Plagiarism is defined as “the presentation of another person’s work or ideas without proper or complete acknowledgement.” It is the serious academic offence of reproducing someone else’s work, including words, ideas and media, without permission for course credit towards a certificate, diploma, degree and/or professional designation. The defining characteristic is that the work is not yours.

“Intentional plagiarism is the deliberate presentation of another’s work or ideas as one’s own.” Intentional plagiarism can be a copy of material from a journal article, a book chapter, data from the Internet, another student, work submitted for credit in another course or from other sources.

“Unintentional plagiarism is the inadvertent presentation of another’s work or ideas without proper acknowledgement because of poor or inadequate practices. Unintentional plagiarism is a failure of scholarship; intentional plagiarism is an act of deceit.”

### **What are the Students’ Responsibilities to Avoid Plagiarism?**

Students have a responsibility to read the OC Plagiarism Policy and Procedures outlined in the OC calendar, which is available in online format [www.okanagan.bc.ca](http://www.okanagan.bc.ca). Students must acknowledge the sources of information used on all their assignments. This usually involves putting the authors’ name and the year of publication in parentheses after the sentence in which you used the material, then at the end of your paper, writing out the complete references in a Reference section.

“Students are responsible for learning and applying the proper scholarly practices for acknowledging the work and ideas of others. Students who are unsure of what constitutes plagiarism should refer to the UBC publication “*Plagiarism Avoided; Taking Responsibility for your Work*”. This guide is available in OC bookstores and libraries.

Students are expected to understand research and writing techniques and documentation styles. The Okanagan School of Business requires the use of the APA or MLA style, but suggests that students cite references using the APA guidelines (see Publication Manual of the American Psychological Association, 6<sup>th</sup> edition (2009). A copy of the APA manual is available in the reference section and also available for circulation from OC libraries. The library website has access to these two major citing styles.

### **What are the Penalties for Plagiarism and Cheating?**

The Okanagan School of Business does not tolerate plagiarism or cheating. All professors actively check for plagiarism and cheating and the Okanagan School of Business subscribes to an electronic plagiarism detection service. All incidents of plagiarism or cheating are reported and result in a formal letter of reprimand outlining the nature of the infraction, the evidence and the penalty. The Dean of the Okanagan School of Business and the Registrar record and monitor all instances of plagiarism and cheating. Penalties for plagiarism and cheating reflect the seriousness and circumstances of the offence and the range of penalties includes suspension from OC.