

COURSE DESCRIPTION

COURSE: Strategic Selling and Customer Relationship Management
SCS 0087 - 012

CERTIFICATION: This course is part of the certificate program in:
Managing Marketing as Competitive Intelligence
Strategic E-Business Management

INSTRUCTOR: Robert Gillelan, B.A., CPR, CRM-PM

DATE/TIME: Wednesdays, 6:00PM - 9:00PM
17 Jan 2007 to 7 Mar 2007
Number of Sessions: 8

Location: St. George Campus,
Gerald Larkin Bldg, Room 341
15 Devonshire Place, Toronto, ON

REQUIRED TEXTBOOK(S): No Text book required
HANDOUTS WILL BE DISTRIBUTED IN CLASS.

Recommended Textbooks.

The CRM Handbook: A Business Guide to Customer Relationship Management
Jill Dyche, Addison-Wesley Pub Co; ISBN: 0201730626

Strategic Database Marketing: The Master plan for Starting and Managing a
Profitable Customer-Based Marketing Program
Arthur M. Hughes, McGraw-Hill Professional Publishing; ISBN: 0071351825

Enterprise One to One
Don Peppers and Martha Rogers, Random House, ISBN: 038548755X

BRIEF COURSE DESCRIPTION:

This course casts customer relationship management (CRM) in the context of a strategic database system and the Web which enable you to achieve a better customer focus. CRM can be used strategically to change or enhance a business's selling policies, products, distribution or promotional programs, or tactically change dealings with prospects or customers.

PREREQUISITE: Marketing: An Introduction (SCS 0978) or equivalent knowledge.

LEARNER OUTCOMES:

- An understanding of “business to business” database marketing principles;
- The ability to identify the causes of CRM database success and failure;
- Knowledge of key CRM concepts, such as “lifetime value” and “personalization” and how these are used in planning and implementing successful marketing programs;
- Familiarity with CRM Readiness Assessments and the use of CRM databases in conjunction with the Web;
- The ability to use CRM database strategies and techniques for building and measuring customer loyalty.

EVALUATION:	Attendance	20%
	Term Test (1 @30%)	20%
	Final Test (1 @30%)	20%
	Final Group Case Submission	40%

Grading Categories:

A	80 to 100%	Excellent
B	70 to 79%	Good
C	60 to 69%	Adequate
D	50 to 59%	Marginal
FX	Less than 50%	Inadequate/incomplete

Students can expect to receive feedback and marks, if applicable, before the course end date, for all their submitted assignment(s) and term test(s) other than the final exam or final project or final course paper. However, it is the sole responsibility of students to make sure that they do get these marks from their instructor and have all related questions answered before the course ends.

Strategic Selling and Customer Relationship Management (CRM)

COURSE OUTLINE

COURSE:	Strategic Selling and Customer Relationship Management (CRM), SCS 0087
COURSE INSTRUCTOR:	Robert Gillelan, BA, CPR, CRM-PM
INSTRUCTOR CONTACT:	Robert.gillelan@gmail.com 416.569-9688
RESTRICTIONS:	Instructor will return emails and telephone calls within two business days

SESSION	TOPIC	READINGS	CASE OR ASSIGNMENT
1	<p>Concepts</p> <p>The objectives of this session are:</p> <ol style="list-style-type: none"> 1. Course Overview 2. Define CRM and Strategic Selling 	HANDOUTS and links to additional reading by e-mail	<p>Form Groups</p> <p>Short-list candidate companies for Case Study and Start Research</p>
2	<p>Defining Your Customers Defining Sales Processes</p> <p>During this session students will:</p> <ol style="list-style-type: none"> 3. Customer Segmentation 4. Measurable Strategic Sales Processes 	HANDOUTS and links to additional reading by e-mail	Group selects one of Brand Case Study Candidates for development into Final Case Study

SESSION	TOPIC	READINGS	CASE OR ASSIGNMENT
3	<p>Personalization and ROI</p> <p>During this session students will:</p> <ul style="list-style-type: none"> 5. Learn about implementing relationship marketing 6. Learn how to calculate CRM Return on Investment 	HANDOUTS and links to additional reading by e-mail	Continue work on Group Brand Case Study
4	<p>Customer Experience Strategies and Implementing Customer Life Time Value Metrics</p> <p>During this session students will:</p> <ul style="list-style-type: none"> 1. Learn C.E. Strategies 2. Learn Lifetime Customer Value and how to use it in Market Planning 	HANDOUTS and links to additional reading by e-mail	Continue work on Group Brand Case Study
5	<p>Customer Loyalty and Communications</p> <p>During this session students will:</p> <ul style="list-style-type: none"> 7. Key's to creating profitable and powerful customer communications 8. How to develop customer loyalty programs 	HANDOUTS and links to additional reading by e-mail	Continue work on Group Brand Case Study

6	<p>CRM Processes and B2B Marketing</p> <p>During this session students will:</p> <ol style="list-style-type: none"> 9. Work on translating sales and marketing process requirements into CRM design 10. Focus on B to B database marketing 	HANDOUTS and links to additional reading by e-mail	<p>Continue work on Group Brand Case Study</p> <p>Early submission of Group Brand Case Study for evaluation</p>
7	<p>Consumer Database Marketing CRM Critical Success Factors</p> <p>During this session students will:</p> <ol style="list-style-type: none"> 1. Discuss how to Combine Databases with the Web 2. Learn why databases fail 3. CRM Readiness Assessment 	HANDOUTS and links to additional reading by e-mail	Continue work on Group Brand Case Study
8	<p>CRM Strategic Selling Presentations</p> <p>During this session students will:</p> <ol style="list-style-type: none"> 1. Group Presentations 2. Final Test 	HANDOUTS	<p>Submit Group Brand Case Study</p> <p>Final Quiz</p>

Guidelines for Writing the Strategic Selling and CRM Case Study

Students will be required to submit a detailed Branding Case Study Candidate. Your group will be required to submit a detailed document of a Company and Brand Specific Sales and Marketing Plan that leverages CRM and Strategic Selling for an existing on-line or offline brand. This document should follow the processes of writing a strategic marketing plan, which will be discussed in the course.

The submission should be at least 30 typed pages long (double spaced) but must not exceed 60 pages.

I. CRM and Strategic Selling Problems Identified

- Issues related to the company,
 - Brands and products
 - Market position,
 - Marketing initiatives
 - Sales channels
 - Sales execution.
- Describe the brand personality
- Describe the corporate sales style.

II. Research:

- Who or what is the target market?
- What is the dollar value potential market?
- What is the consumer or corporate size of the potential market?
- What is the current brand hierarchy in the marketplace?
- Who/what is the competition?
- How are the company and the brand perceived?
- What CRM tools are used by the company currently?
- What CRM tools are used by competitors?

III. Analysis

- Identify the value in the sales process and product lines
- Define how well the sales team is selling the branded product or service
- Determine the risk-reward of investing further in the CRM
- Pinpoint where investments should be made in the sales force
- How well does the current Internet initiative align with their offline campaigns?
- Relate the competitor's presence in the online marketplace.

IV. Proposed CRM and Strategic Selling Activities

- Present a strategic initiative that creates significant value for company and customers
- Based initiatives on real business process and brand strengths
- Identify initiatives based on marketplace opportunities
- How will these initiatives create a competitive advantage
- Develop ideas in ways that are clear and motivating to the market
- How do you build customer appreciation into the customer experience

V. Evaluation Criteria for Enhancement Activities

- How do you measure increases in consumer activity as well as sales and marketing initiatives?
- How will you measure increase in positive participation between the company and the customer?
- What is the projected customer lifetime value?
- Detail measurements to determine how opted-in the consumers are following your sales, marketing and brand building activities?

VI. Required Submission Format

Required Submission Format

Treat this as a Business document you'd present to a client or an executive sponsor!

All submissions must have a Title Page, Abstract/Executive Summary, Table of Contents, Appendices of supporting primary and secondary research materials, bibliography/references links/resources a Glossary (with terms relative to your market) and a cover letter or memo.

Document Format

12 point type, double spaced, one sided, and cerlox bound

Electronic Format

For your electronic submission to be accepted, you MUST use one of the following file formats.

Microsoft Word (Windows or Macintosh)

How to submit your Group or Individual Assignments

Please deliver them in class. Send electronic documents as uncompressed attachments to robertg@gillelan.com

N.B. Virus infected documents will be auto-deleted, so virus check your strategic plan before submission. It's your responsibility to keep your documents virus free!

All data, information and ideas that are NOT your own must be properly cited (using end notes) and the author(s) be given credits. End notes should be single spaced. The main text must be double spaced. There's nothing wrong in using other people's ideas and data for your term paper but plagiarism (i.e. using data and ideas from others without giving proper credits to the author(s)) is a very serious academic offense that will result in your failing the course.