




Business Administration

Course Number:	BUAD 470
Course Title:	CUSTOMER RELATIONSHIP MANAGEMENT
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:	WINTER 2024
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:	
Originally Developed:	April 2007
EDCO Approval:	March 2009
Chair's Approval:	

Professors

Name	Phone number	Office	Email
Todd Gillick (Course Captain)	250-762-5445 ext. 4564	K:C127	tgillick@okanagan.bc.ca

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 data-mining techniques to 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 based on sound data analysis.
- 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, Quizzes)	20%
Term Test #1	15%
Term Test #2	15%
CRM Project:	
Proposal	5%
Interview Guide	5%
Project Planning Log Book	10%
Written Report	20%
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.
- 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.
- 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.

Required Texts/Resources

Managing Customer Experience and Relationships: A Strategic Framework, Third Edition,
by Don Peppers and Martha Rogers

Wiley 2017

ISBN- 978-1-119-23625-2

Course Schedule:

Date		Topic	Textbook
2024 Week of:		Monday, January 8th – First Day of Classes Monday, February 19th – STATATORY HOLIDAY Tuesday, February 20TH– Friday, February 23RD – Reading Break Friday March 29th – Monday, April 1st – STATATORY HOLIDAY Friday April 12TH– Last Day of Regular Classes April 16 th - 25 th Final Exam Period	
1	Jan 8	Project Introduction Ch 1 - Evolution of Relationships with Customers Ch 2 - The Thinking behind Customer Relationships	Ch 1, 2
2	15	Ch 3 – Customer Relationships Ch 4 – Identifying Customers CRM Project & Team Selection	Ch 3, 4
3	22	Ch 5 – Differentiating Customers: Some are worth more Ch 6 – Differentiating Customers by Their Needs	Ch 5, 6
4	29	Ch 7 – Interacting with Customers Ch 8 – Customer Insight, Dialogue and Social Media CRM Project Proposal Due Feb 2, 23:55	Ch 7, 8
5	Feb 5	Ch 9 – Privacy and Customer Feedback Review CRM Project Interview Guide Due Feb 09th, 23:55	Ch 9
6	12	Term Test 1 (15%) Ch 10 – The Payoff of IDIC (Identify, Differentiate, Interact, Customize)	
7	19	READING BREAK (<i>Feb 19 – 23 no classes</i>)	Ch 10
8	26	Ch 11 – Optimizing around the Customer	Ch 11
9	Mar 4	Ch 12 – Using Customer Analytics	Ch 12
10	11	Ch 13 – Organizing and Managing the Profitable Customer P1 Ch 14 – Organizing and Managing the Profitable Customer P2	Ch 13,14
11	18	Ch 15 – Futureproofing the Customer-Centric Organization Review	Ch 15
12	25	Term Test #2 (15%) Project Work	
13	Apr 1	Project Work / Presentations	
14	8	Presentations	
15		FINAL EXAM PERIOD (APR 19-28)	

SKILLS ACROSS THE BUSINESS CURRICULUM

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

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. 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, 7th edition (2019)). 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.