University of North Carolina at Greensboro
Bryan School of Business and Economics
M.B.A. Evening Program

MBA 695-L.71, Customer Relationship Management
Summer 2008, Session II

Instructor:	**G. Jason Goddard**
Place:	Room 205, Joseph M. Bryan School of Business & Economics
Time:	Thursdays (6:00 PM to 9:30 PM)
Office:	Room 344E, Bryan Building (336) 334-4318, (GJGoddar@uncg.edu)
Office Phone:	(336) 747-8594 (**best way to reach me during business hours**)
Home Phone:	(336) 765-1613 (after 5 PM weekdays, and weekends)
Email (Work):	Jason.Goddard@Wachovia.com (during business hours)
Email (Home):	GoddardGeorge@BellSouth.net (after 5 PM weekdays & weekends)
Office Hours:	By Appointment Only
Course Text:	"Customer Relationship Management: A Global Perspective", Raab/Ajami/Gargeya/Goddard, Gower Publishing, 2008. ISBN-10: 0754671569 ISBN-13: 978-07546-7156-5
Prerequisites:	MBA 606

Course Description

The course is an introduction to the management philosophy known as customer relationship management (CRM). CRM is a strategic form of sustainable competitive advantage in today's ever-vibrant business world. Companies that can learn to view their customer portfolio in ways that maximize long-term, profitable relationships at the sake of short-run transaction-oriented approaches can utilize CRM in a global context to achieve company success. This course will involve case studies of how other companies have approached implementation of CRM, and will culminate with a group case study paper and presentation. Students with an interest in relationship marketing, total quality management, competitive strategies in the service sector, and international components of organizational strategy would benefit from this course offering.

Course Learning Objectives

1. Explain the importance of effective, profitable customer relationship practices to the future success of the firm.
2. Discuss the benefits and issues of implementation of CRM in a global context.
3. Elaborate on the importance and best practices of customer orientation in an organizational context.
4. Discuss the importance of product and service quality for the firm generally, and the Kano model and Quality Function Deployment (QFD) model specifically.
5. Explain the importance of maintaining high levels of customer satisfaction for an organization, and best practices for measuring performance.
6. Discuss strategies for effective customer retention and service recovery for organizations operating in a global environment.
7. Identify the methods of assessing customer value in a CRM context.

8. Integrate the various components of the CRM philosophy into an effective strategy via the balanced scorecard.

Class Attendance

This course meets one time per week, for a total of 6 class meetings. Since the course only meets once per week, failure to attend class regularly will have a negative impact on your grade. The class discussions form the basis for all graded materials, so missing more than one class during our abbreviated summer session is highly discouraged. Missing class will also adversely affect your class contribution grade. Those who come to class regularly and on time, make positive contributions to class discussion, and ask relevant and insightful questions will earn a strong contribution grade. Should any of our sessions be cancelled due to weather or any other reason, students are still responsible for all material for that night's session. The power point slides for each class session will be posted on Black Board for your review.

Grading

There will be three means of assessment in the course. The first task is a summary of a recently published article that pertains to CRM. Please see the section entitled "Individual Article/Company Summary & Presentation" below for details. Students will also be required to complete a group case study evaluation. The group paper will be based on the case *AB Swedish Lumber*, in your text, with group papers and presentations due on our final day of class, August 7, 2008. Please see the section entitled "Group Paper and Presentation" below for details. Class contribution will make up the final portion of your grade in this course. Please see the section entitled "Individual Class Contribution" below for details. The distribution of grades is as follows:

Individual Article/Company Summary & Presentation	30%
Group Paper & Presentation	50%
Individual Class Contribution	20%
Total	**100%**

Grading Scale

94-100	A		80-82	B-
90-93	A-		77-79	C+
87-89	B+		73-76	C
83-86	B		70-72	C-
			< 70	F

Individual Article/Company Summary & Presentation

Part of your final grade will be the completion of one article summary of a topic relevant to the class. The paper and presentation should be concerning any topic that involves the implementation of customer relationship management, or other topics that are discussed during the course of the semester. The article summary should be written, and be between three and five pages in length, with a short presentation on your paper given orally in the class on the assigned date (**10 minutes maximum**). Students will be placed in one of three groups, and each group member will present a different article than the other group members on the assigned class session. There are a myriad of publications that deal with the implementation of customer relationship management generally, or contain articles that pertain to specific areas of interest in the course, such as customer satisfaction, customer

retention, customer profitability, etc. If at all possible, articles selected should be of sufficient length and depth to allow for an **up to ten-minute presentation** in front of the class, as well as a **written summary** of from **three to five pages in length**. Eligible articles should be selected from peer-reviewed journals such as the Journal of Service Research, Journal of Business and Industrial Marketing, and the Journal of Asia-Pacific Business, among others. You may also select current articles from well-known business publications such as the Wall Street Journal, the Economist, the Harvard Business Review, or the Financial Times. If you have found an article from sources other than those listed here, please let me know as soon as possible. **On the evening of your presentation, please provide a copy of your article as well as a copy of your written analysis.** *Alternatively, you could present a summary of how your company is effectively managing customer relationships.* Students that select this alternative could focus their short presentation and written assignment on any of the topics that we have discussed in class, and on how the chosen company has successfully or unsuccessfully implemented CRM. Papers should be well integrated with the course and have references from sources as cited above.

Group Paper and Presentation
Each group will be responsible for the analysis of a case in your course packet: AB Swedish Lumber. This will be due on the final night of class, and each group will be responsible for a presentation of your analysis of the company as well as the group's recommendations as to the future needs of the firm in order to make the firm "CRM enabled". **Papers** should be limited to **ten pages exclusive of any exhibits**. **Presentations** will be **limited to twenty minutes**. The most effective papers and presentations will be those that best integrate the text and class discussions with case recommendations. Papers and presentations will be graded based on professionalism, the logical flow of ideas and recommendations, and the sources cited. *Please limit the number of students per group for this assignment to a maximum of three.* The course will utilize the Viva Voce Examination process for presentations: each group will play the role of CRM consultant for the final presentation. Each group will be given a specific time to arrive and depart the class, and students will prepare a presentation as if for the Board of AB Swedish Lumber.

Class Contribution
Class contribution points will be awarded based on the **quality of the content added** to the class discussions as opposed to the quantity of the content added. Questions posed by students should be relevant to the material being covered in the class, and the Instructor will make an effort to learn students' names as early as possible in the semester. A student will receive class contribution points for coming to class prepared and adding to the discussion with meaningful, insightful comments. What I am looking for is evidence that students are integrating the textbook material with the supplemental material covered during class time.

Class Procedures
The content of this course will be conveyed through a mix of lectures, discussions, and cases. Each approach in the mix is designed to develop and elaborate on the content of the assigned readings. Students are expected to discuss knowledgeably the assigned readings, to raise any questions that they have about the readings, and to participate in the class discussions. Since the course meets once per week for a total of three hours and thirty minutes, we will usually break around 7:45 for 15 minutes. Each lecture will contain a discussion of current events, discussion of topics that are directly related to the chapter being discussed on a given evening, and the discussion of select cases as noted in the schedule later in this syllabus. If

we do not cover all of the bullet points for a given lecture, the student is still responsible for the material. Should class be cancelled for any reason, or if we do not cover all of the slides during a given session, the students are still responsible for all material (slides to be posted on Black Board).

Biographical sketch of the Instructor

Goddard, G. Jason is currently Vice President at Wachovia Bank, where he has been a commercial lender for over 10 years. Mr. Goddard is currently real estate risk advisor for income producing investment real estate loans in the business and community banking segments, and works in Winston-Salem. All of Mr. Goddard's financial services industry experience has involved direct customer relationship management experience, since providing financial expertise is of paramount importance for the business and community banking segments, and is a key to winning profitable, long-term relationships for Wachovia Bank. He obtained his MBA from the Bryan School at the University of North Carolina at Greensboro. Mr. Goddard is currently instructor at the Bryan School, and is the Assistant Editor of the *Journal of Asia-Pacific Business,* where he has authored numerous articles. Mr. Goddard teaches the investment real estate course at UNCG in the Finance and Accounting Department. Mr. Goddard also teaches the subject annually at the RMA-ECU Commercial Real Estate Lending School at East Carolina University in Greenville, NC. He also teaches an introductory undergraduate course in international business at UNCG, and has co-taught the subject in the MBA program at the Bryan School as well as coordinated the *America in the Global Economy* lecture series at UNCG. Mr. Goddard has led a group of MBA students on the study abroad program in Paris, France, and teaches annually in Ludwigshafen Germany at the University of Applied Sciences. Mr. Goddard is co-author of *International Business: Theory and Practice, Second Edition,* which was issued by M.E. Sharpe Publishers in September 2006. His second co-authored book, *Customer Relationship Management: A Global Perspective*, was published by Gower Publishing in May 2008.

Finally, the bullet points for each night's sessions highlight the talking points of the lectures for that evening. In order to provide the best analysis for the final case study, it is highly recommended that students integrate the text material, class discussions, and case data into an effective presentation of group findings. Any scheduled class time which remains following the conclusion of an evening's lecture should be used for the preparation of group assignments in the course.

MBA 695-L.71 Course Schedule (Summer 2008)

Class	Date	Topic	Assigned Reading
1	July 3	Course Introduction	Ch. 1 & 8

- A Global Perspective on CRM
- The Concept and Relevance of CRM
- Three Pillars of CRM
- Advantages & Objectives of CRM
- Pitfalls of CRM Implementation

Class	Date	Topic	Assigned Reading
2	July 10	Customer Orientation	Ch. 2 & Case

- Concept and Relevance of Customer Orientation
- Customer Orientation & Personnel
- Customer Orientation & Technology
- Customer Orientation & Organizational Structure
- **Case Discussion: Customer Orientation at Tesco**

Class	Date	Topic	Assigned Reading
3	July 17	Product Quality & Customer Satisfaction	Ch. 3 & 4, Case, **Group 1**

- Concept and Relevance of Product Quality
- The Kano Model
- Quality Function Deployment
- Concept and Relevance of Customer Satisfaction
- Classical Customer Satisfaction Model
- Customer Satisfaction and Behavioral Science
- Customer Satisfaction Measurement Methods
- **Case: Customer Satisfaction at Paradorn Bank**

Class	Date	Topic	Assigned Reading
4	July 24	Customer Retention & Customer Value	Ch. 5&6, Case, **Group 2**

- Concept and Relevance of Customer Retention
- Advantages of Customer Retention
- Customer Retention Tools
- Approaches to Acquiring Customer Profitability
- Customer Lifetime Value
- Customer Value Development
- **Case: Discovery**

Class	Date	Topic	Assigned Reading
5	July 31	Company Success & Balanced Scorecard	Ch.7& Cases, **Group 3**

- Customer Lifecycle and the Customer Mindset
- The Four Perspectives of the Balanced Scorecard
- The Meaning of the Cause & Effect Relationship
- **Case: Leban & The Croatian Frozen Packaged Foods Market**
- **Case: Mikhak Fresh Cut Flowers**
- Use remaining class time to finalize group presentations/papers

Class	Date	Topic	Assigned Reading
6	August 7	Group Presentations/Final Paper	None

- **Final Group Paper Due Tonight…**
- **Presentations of Final Case: AB Swedish Lumber**
- **Presentation Times to be Scheduled In Advance**