

CUSTOMER RELATIONSHIP MANAGEMENT

Course code	<i>MNG244</i>
Compulsory in the programmes	<i>Business Management and Marketing</i>
Level of studies	<i>Undergraduate</i>
Number of credits	<i>6 ECTS (48 contact hours + 6 consultation hours, 106 individual work hours, 2 exam hours)</i>
Course coordinator (title and name)	<i>Prof. Dr. Filipa Fernandes, filfer@faculty.ism.it</i>
Prerequisites	<i>None</i>
Language of instruction	<i>English</i>

Course description

Customer relationship management (CRM) is the mix of practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle. This Course intends to provide an insider's overview of how to analytically and strategically recognize, collaborate and deploy Customer Relationship Management in a company to maximize the value of and for each customer. Students should be able to understand how to transform customer information in effective and efficient communication and decision making processes, creating value through tools to support organizational intelligence.

Course aim

The course aims to provide the students the key concepts and methodologies for managing the customer relationship as well as key standards, technologies and systems that allow organizations to maintain, deepen and develop better relationships with their customers.

Learning outcomes

Course level learning outcomes (objectives)	Degree level learning objectives (Number of LO)	Assessment methods	Teaching methods
CLO1. Understand the strategic importance of relationship marketing in organizational management	BLO1.1.	Lectures, Challenges, Class Participation, Group Work, Seminars, Exam	Lecture, self-study, individual and group challenges
CLO2. Recognize the importance of implementation of a CRM strategy in the organization of the company	BLO1.2.	Lectures, Challenges, Class Participation, Group Work, Seminars, Exam	Lecture, problem solving, group homework, self-study
CLO3. Understand the concept of customer life cycle and SP model	BLO1.1.	Lectures, Challenges, Class Participation, Group Work, Seminars, Exam	Lecture, group homework, self-study
CLO4. Identify the different types of CRM and practical examples in different business areas	BLO1.1.	Lectures, Challenges, Class Participation, Group Work, Seminars, Exam	Lecture, group homework, seminar, self-study

CLO5. Understand the importance of relationship marketing strategies in the value creation process for the individual customer	BLO1.1.	Lectures, Challenges, Class Participation, Group Work, Seminars, Exam	Lecture, problem solving, individual homework, self-study
CLO6. Learn how to plan the implementation of CRM and the role of technology	BLO1.2. BLO3.1. BLO4.1. BLO4.3.	Lectures, Challenges, Class Participation, Group Work, Seminars, Exam	Lecture, group homework, self-study
CLO7. Learn about the future trends in CRM	BLO2.1.	Lectures, Challenges, Class Participation, Group Work, Seminars, Exam	Lecture, Group homework, self-study

Quality management

The quality of the course is assured by the variety of teaching and learning methods, interim knowledge assessment through homework, continuous discussions of individual and group work, other assignment results, as well as by supply of learning materials to students.

Cheating issues

The teaching and testing methods are chosen taking into account the purpose of the minimization of cheating opportunities. Individual tasks are assigned. Task rotate year by year, from student to student. During the exam, some assistance is expected from the teaching staff (e.g. PhD students). The ISM regulations on academic ethics will be fully applied in the course.

Use of AI Tools

All course participants must comply with the ISM University of Management and Economics Artificial Intelligence Policy published on the e-learning platform.

Group Work Report and Oral Presentation (45%)

Generative AI may be used to support the group work, including exploring CRM concepts and practices, analysing the company and its customers, identifying and comparing CRM approaches, generating potential strategic alternatives, supporting customer and data analysis, and improving the structure, clarity and language of the report and presentation.

The CRM diagnosis, analysis, proposed strategy and recommendations must reflect the group's own reasoning and application of course concepts. AI-generated information must be critically evaluated and verified against credible sources. Students must be able to explain and defend all analyses, decisions and recommendations presented in the report and oral presentation.

Class Participation and Challenges (25%)

Students are expected to demonstrate their own understanding and actively contribute to class discussions and challenges. AI may be used for preparation, clarification of concepts, exploration of examples and idea generation. During in-class challenges, AI may be used only where explicitly permitted by the instructor. Students must be able to explain and justify their answers and recommendations independently.

Exam (30%)

The exam is individual work. The use of generative AI or other automated assistance during the examination is not permitted and will be treated as cheating. AI may be used for exam preparation, for example to clarify concepts, generate practice questions or support self-testing, but the knowledge and understanding demonstrated during the examination must be the student's own.

Course content

DATE TIME	TOPIC	Class Hours		READINGS
		Lecture	Seminar	
SESSIONS 1,2,3	Introduction to the Course. Course requirements and procedures. Individual tasks and team work. Reporting requirements. Overview of tasks for assignments.	1		
	CRM origins and evolution; Diagnosing CRM level in a company and the IDIC model	2	1,5	Recommended bibliography + classroom articles
	Challenge of the Day			
SESSIONS 4,5,6	Briefing on client: Identifying and differentiating customers;	2,5	2	Recommended bibliography + classroom articles
	Segmentation: techniques, models and cases;			
	Challenge of the Day			
SESSIONS 7,8,9	Interacting with the customer and the role of social media: integrated and omnichannel strategies	2	2,5	Recommended bibliography + classroom articles
	Benchmarking CRM practices across industries			
SESSIONS 10,11,12	Privacy, permission marketing and mass customization	2,5	2	Recommended bibliography + classroom articles
	Measuring success and campaign analysis			
	Introduction to the Group Work			
SESSIONS 13,14	Company CRM diagnosis: including business plan and practical examples	1,5	1,5	Recommended bibliography + classroom articles
	Challenge of the Day			
SESSIONS 15,16	Customer analytics - deriving value	1,5	1,5	Recommended bibliography + classroom articles
	Organizing, managing and setting the future of the profitable customer-strategy enterprise			
	Challenge of the Day			
SESSIONS 17,18, 19	Company CRM Plan Evaluation + LTV approach proposal	2,5	2	Recommended bibliography + classroom articles
	Main trends in CRM: Future developments, Partner Relationship Management, Citizen Relationship Management, Social CRM Exam			

DATE TIME	TOPIC	Class Hours		READINGS
		Lecture	Seminar	
SESSIONS 20,21	Group Work Development: structure, goals and exploring potential directions including AI approach	1,5	1,5	
SESSIONS 22,23,24	Group Work Presentations and Open discussion	2	2,5	
CONSULTATIONS		12		
	Total	48 hours		

FINAL GRADE COMPOSITION

Type of assignment	%
Group Components 45%	
Group Work Report and Oral Presentation	45%
Individual Components 55%	
Exam	30%
Class Participation and Challenges	25%
Total:	100

DESCRIPTION AND GRADING CRITERIA OF EACH ASSIGNMENT

1. Group Work Report and Oral Presentation. This component evaluates the effectiveness of group projects through both written reports and oral presentations. The grading focuses on the depth and accuracy of the content presented, the organization and clarity of the report, as well as the delivery and engagement of the oral presentation. This assignment tests students' ability to work as a team, synthesize information, and present it in a compelling way to an audience.

2. Exam. The Exam constitutes 30% of the total grade and is designed to assess individual understanding and mastery of the course content.

3. Class Participation and Challenges. Class Participation and Challenges account for 25% of the total grade, emphasizing the importance of active engagement and responsiveness in the learning environment.

Students who receive a failing final grade shall have the right to re-take the exam, which will comprise 30% of the final grade and cover all topics of the course. Final exam result will be annulled.

REQUIRED READINGS

Kumar, V. & Reinartz, Werner (2023): *Customer Relationship Management*, 3rd Edition (Springer-Verlag), ISBN: 978-3662645536.

Goodman, John A. & Broetzmann, Scott M. (2019): *Strategic Customer Service*, (HarperCollins), ISBN:978-0814439050, 0814439055

Peppers, Don & Rogers, Martha (2016): *Managing Customer Relationships: A Strategic Framework*, 2nd Edition (Wiley), ISBN:978-0470423479



SUPPLEMENTAL READINGS

Prior, Daniel D., Buttle, Francis & Maklan, Stan (2024): Customer Relationship Management: Concepts, Applications and Technologies, 5th Edition (Routledge), ISBN: 978-1032247441.

Rogers, David (2013): The Network is Your Customer (Yale University Press), ISBN: 978-0300188295

ANNEX

DEGREE LEVEL LEARNING OBJECTIVES

Learning objectives for the Bachelor of Business Management

Programmes:

*International Business and Communication,
Business Management and Marketing,
Finance,
Industrial Technology Management,
Entrepreneurship and Innovation*

Learning Goals	Learning Objectives
Students will be critical thinkers	BLO1.1. Students will be able to understand core concepts and methods in the business disciplines
	BLO1.2. Students will be able to conduct a contextual analysis to identify a problem associated with their discipline, to generate managerial options and propose viable solutions
Students will be socially responsible in their related discipline	BLO2.1. Students will be knowledgeable about ethics and social responsibility
Students will be technology agile	BLO3.1. Students will demonstrate proficiency in common business software packages
	BLO3.2. Students will be able to make decisions using appropriate IT tools
Students will be effective communicators	BLO4.1. Students will be able to communicate reasonably in different settings according to target audience tasks and situations
	BLO4.2. Students will be able to convey their ideas effectively through an oral presentation
	BLO4.3. Students will be able to convey their ideas effectively in a written paper