

# CRM COURSE OUTLINE

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## Course Description

Customer Relationship Management (CRM) is one of the most important components for sustenance and growth of an organization. With the advancement of software technologies, significant progress has been made in designing and managing CRM systems. These efforts envisage facilitating better customer interactions and greater understanding about customers; thus helps an organization build competitive advantages.

This course plans to impart a sound introduction to CRM, a comprehensive understanding of the processes involved, strong understanding of software components in different CRM systems, and practical applications of CRM in different sectors. As the course is targeted to students of rural management, it includes practical examples with strong lineage to rural planning and development.

## Duration

9 hours split into 6 classes of 1.5 hours duration

## Evaluation

Each module will have a set of quizzes; and there will be an examination of 120 minutes at the end of the course.

## Course Outline

### Class 1: Introduction to CRM

- What is Customer Relationship Management?
- Impact of IT and Globalization on CRM
- Evolution of CRM and Classifications
- The Value Pyramid
- Customer Interaction Cycle
- Customer Profiling and Total Customer Experience
- Goals of a CRM Strategy and Obstacles
- CRM Solutions Map
- Customer Centric Enterprise (CCE)
- Discussing People, Processes and Technology
- CRM in Various Industries
- Misconceptions about CRM

## Class 2: Managing Processes in CRM

- Different Processes and Information Flow
- Customer Lifecycle Management (CLM)
- Customer Lifetime Value (CLV)
- Contact Management
- Activity Management
- Issue Management
- Workflow Management
- Sales Force Automation (SFA)
- Opportunity Management
- Marketing Automation
- Collaboration Processes
- Enterprise Portals and Dashboards

## Class 3: Analytics in CRM

- An Introduction to Analytics
- Pattern Based Strategy
- Analytics Techniques and Methods
- CRM Intelligence Management Cycle
- CRM Data Warehouse
- Customer Centric Data Mining
- Measuring Profitability

## Class 4: CRM Tools

- Classifications of CRM Tools
- Microsoft Dynamics CRM 3.0
- Sugar CRM
- VtigerCRM 5
- Open CRX
- Compiere ERP and CRM
- Salesforce CRM
- Zoho CRM
- BATOI CRM

## Class 5: Implementing CRM in an Enterprise

- Defining the CRM Vision
- Assessing CRM Readiness
- Factors Affecting CRM Implementation
- CRM Implementation Challenges
- Phases of CRM Implementation
- Upgrades and Change Management
- CRM Implementation Pitfalls
- CRM Performance Measurement

## Class 6: CRM Case Studies

- CRM in Different Industries and Sectors
- Customer Relationship Management (CRM) in Banking
- CRM Solution for a Farm Equipment Manufacturer
- Customer Relationship Management at Farm Credit Services of Mid-America
- Developing E-Government Integrated Infrastructures: A Case Study
- A Case Study of Emergent and Intentional Organizational Change