

SAN DIEGO COMMUNITY COLLEGE DISTRICT  
CONTINUING EDUCATION  
COURSE OUTLINE

**SECTION I**

**SUBJECT AREA AND COURSE NUMBER**

BUSN 640

**COURSE TITLE**

Customer Relationship Mgmt

**ALTERNATE COURSE TITLES**

- CRM Systems
- Salesforce CRM System
- Hubspot CRM System
- Modern CRM Systems

**TYPE COURSE**

NON-FEE

VOCATIONAL

**CATALOG COURSE DESCRIPTION**

This course provides students with training in the technical and problem-solving skills used by sales professionals, customer service representatives, administrators, and office administration assistants in current customer relationship management (CRM) systems. This is a hands-on project-based course covering the following topics: overview of CRM, the current job market for professionals skilled in using CRM, how to create a CRM system, input and editing of customer data, how to create reports and marketing materials from the CRM, and the basics of how to manage a team using a shared CRM system. Students who successfully complete the course will be able to launch and manage a CRM system for a small business or be able to utilize a CRM in a professional sales position This course will cover one software currently in demand. This course may be offered in a distance-learning format. (FT)

**LECTURE/LABORATORY HOURS**

90

**ADVISORIES**

NONE

## RECOMMENDED SKILL LEVEL

Possess a 10<sup>th</sup> grade reading level, ability to communicate effectively in the English language, knowledge of math concepts at the 8<sup>th</sup> grade level, and basic computer literacy. Familiarity with Microsoft Office programs, such as Word and Excel (or an application of similar scope), is highly recommended.

## INSTITUTIONAL STUDENT LEARNING OUTCOMES

1. Social Responsibility  
SDCE students demonstrate interpersonal skills by learning and working cooperatively in a diverse environment.
2. Effective Communication  
SDCE students demonstrate effective communication skills.
3. Critical Thinking  
SDCE students critically process information, make decisions, and solve problems independently or cooperatively.
4. Personal and Professional Development  
SDCE students pursue short-term and life-long learning goals, mastering necessary skills and using resource management and self-advocacy skills to cope with changing situations in their lives.

## COURSE GOALS

1. Understand the value of using a CRM system to support small business sales.
2. Learn how to manage a database of customer information.
3. Learn how to create, read, edit, and delete data as well as assignment users to perform these tasks.
4. Learn how to create messaging templates.
5. Learn how to create reports and dashboards.
6. Learn how to create collaboration tools.
7. Learn how to create, filter, format, export, and share CRM data reports and/or dashboards.
8. Learn how to use the CRM system to communicate and/or collaborate with clients, partners, and employees for sales and general communication purposes
9. Understand how CRM systems can connect with external programs and platforms (i.e. connecting Salesforce or HubSpot to Outlook, QuickBooks, or banking platform.).

## COURSE OBJECTIVES

Upon successful completion, the student will be able to:

1. Develop a relationship-driven CRM system that creates value for organizing and growing a small business
2. Demonstrate how users may enter or edit data and communicate effectively with customers
3. Create and present a report or dashboard showing the current status of customers in a CRM
4. Create a strategic planning document that presents how the CRM system may be used for an individual user, allow and control access to additional users, and how it may connect with external programs and platforms

## **SECTION II**

### **COURSE CONTENT AND SCOPE**

1. Overview of Customer Relationship Management (CRM)
  - 1.1. Introduction to CRM
  - 1.2. Benefits of CRM
  - 1.3. Survey of CRM applications and software
  - 1.4. Jobs survey of occupations and careers using CRM
    - 1.4.1. Types of jobs & roles
    - 1.4.2. Salary and pay
    - 1.4.3. Skills & certifications
  - 1.5. Policies and regulations
2. Setting up the course CRM database
  - 2.1. Choose CRM for the course
  - 2.2. Set up account for course projects
3. Data basics
  - 3.1. Objects
  - 3.2. Fields
  - 3.3. Records
  - 3.4. Relationships
4. Entering data
  - 4.1. Entering data manually
  - 4.2. Connecting data entry from connected systems (I.e. online store, partner, or connected app)
  - 4.3. Importing data
5. Sorting Data
  - 5.1. Creating and editing sort categories to customer data
  - 5.2. Sorting customer data
6. Hosting and accessing CRM data
  - 6.1. Online hosting
  - 6.2. Local hosting
7. Security
  - 7.1. Authentication
  - 7.2. Redundancy
  - 7.3. Threats
    - 7.3.1. Internal
    - 7.3.2. External
8. Communication with stakeholders
  - 8.1. Phone
  - 8.2. Email
  - 8.3. Mail
  - 8.4. Online meeting
  - 8.5. Social media
  - 8.6. Community pages
  - 8.7. In-person
  - 8.8. Upcoming technologies
9. Connecting Applications
  - 9.1. Email

## COURSE CONTENT AND SCOPE (continued)

- 9.2. Calendar
- 9.3. Accounting
- 9.4. Shipping
- 9.5. Online store or inventory
- 10. Managing a team
  - 10.1. Setting security levels and access overview
  - 10.2. Training
  - 10.3. Supervising
  - 10.4. User management
    - 10.4.1. Creating Users
      - 10.4.1.1. Assigning unique usernames
      - 10.4.1.2. Creating passwords
      - 10.4.1.3. Supervising
      - 10.4.1.4. Troubleshooting (password reset, deleted data, data fail)
    - 10.4.2. Assigning Roles
      - 10.4.2.1. Create
      - 10.4.2.2. Read
      - 10.4.2.3. Edit
      - 10.4.2.4. Delete
- 11. Data management
  - 11.1. Data quality
  - 11.2. Importation
  - 11.3. Migration
  - 11.4. Security levels
- 12. Data analysis
  - 12.1. Filter
  - 12.2. Dashboards
  - 12.3. Reports

## APPROPRIATE READINGS

Appropriate readings may include, but are not limited to, materials such as textbooks and workbooks, instructor-written handouts, computerized simulations, resource manuals, videos, tutorials, online assistance, and relevant industry periodicals. Topics should be related to the value of creation or adoption of an appropriate CRM for small businesses, the procedures for the setup and management of a CRM including creating reports relevant to sales management, and how strategic planning is performed and best practices for its use.

## WRITING ASSIGNMENTS

Writing assignments will enable the students to demonstrate understanding of course concepts and application of proper writing skills. Appropriate assignments may include, but are not limited to, assigned exercises, written reports, and collaborative projects between students and the instructor. Examples may include: creating a report or dashboard of CRM data, creating a strategic planning document representing how a CRM system may be used in various scenarios.

## OUTSIDE ASSIGNMENTS

Outside assignments may include, but are not limited to, reading texts and reference resources, conducting additional research to complete projects, and reviewing lecture and class notes. An appropriate assignment would include reviewing the procedures for CRM functions including collaboration and communication processes through online technical references, preparing a status report of current customers through the CRM's functions, and utilizing online tutorial videos for the creation of a strategic planning document

## APPROPRIATE ASSIGNMENTS THAT DEMONSTRATE CRITICAL THINKING

Assignments which demonstrate critical thinking may include, but are not limited to, evaluation and analysis of case studies featuring small businesses in various scenarios. Students will utilize this analysis in classroom discussions, writing assignments, and performing activities to develop best practices for starting and managing a small business. Students must select and use appropriate methods and resources to complete assignments. Examples may include: demonstrating how to enter data into a CRM system and problem solving exercises on how to fix issues within a CRM system.

## EVALUATION

Recognizing that every student learns in a different way, a student's grade will be based on multiple measures of performance with the understanding that every reasonable effort will be made to evaluate comprehension and performance using a mix of learning modalities and assessment methods. The methods of evaluation may include, but are not limited to:

1. Maintain attendance and punctuality per current policy.
2. Contribute to class and group discussions and/or activities.
3. Perform in a variety of activities and complete assignments, including demonstrating how users may enter or edit data and communicate effectively with customers.
4. Demonstrate ability to work independently and as a team member.
5. Present a written or oral project presentation demonstrating competency of the course objectives that may include:
  - a. A CRM system that creates value for organizing and growing a small business
  - b. Create and present a report or dashboard showing the current status of customers in a CRM
  - c. Create a strategic planning document that presents how the CRM system may be used for an individual user, allow and control access to additional users, and how it may connect with external programs and platforms

Upon successful completion of all courses included in the program, a Certificate of Program Completion will be issued.

## METHOD OF INSTRUCTION

Methods of instruction may include, but are not limited to, lectures, discussion, hands-on demonstrations, computer-assisted instruction, laboratory assignments, and field trips.

This course, or sections of this course, may be offered through distance education. Includes regular effective contact between instructor and students, and among students, either synchronously or asynchronously, through group or individual meetings, orientation and review sessions, supplemental seminar or study sessions, field trips, library workshops, telephone contact, voice mail, e-mail, or other activities. Examples of instruction methods include a student reviewing online tutorial videos on CRM functions for preparation for a guided activity in which students replicate changes to customer information within a CRM and participating in a class discussion through which students investigate potential CRM data for a sample company to determine what should be included in an effective status report.

## TEXTS AND SUPPLIES

This course will prioritize utilizing zero-textbook-cost openly licensed content to provide equitable learning to all students. Content must be current and relevant to the course such as:

- [Entrepreneurship](#), Lavery, Little, et al, Openstax, current edition.
- [Introduction to Business](#), Gitman, McDaniel, et al, Openstax, current edition.
- [Introduction to Business](#), Hossa, Olender, et al, Lumen Learning, current edition.
- *SELL* by Ingram, LaForge, Avila, Schwepker & Williams, 4LTR Press, current edition.

Additional textbooks and/or openly licensed content to be provided to students at the discretion of the instructor.

The instructor will provide a class syllabus, handouts, and sample business plans.

Supplies: Journal (composition book), USB Drive, or other storage media.

PREPARED BY: Aaron Iffland and Matthew Rivaldi

DATE: December 1, 2021

REVISED BY:

DATE:

Instructors must meet all requirements stated in Policy 3100 (Student Rights, Responsibilities and Administrative Due Process) and the Attendance Policy set forth in the Continuing Education Catalog.

## REFERENCES:

San Diego Community College District Policy 3100  
California Community Colleges, Title 5, Section 55002  
Continuing Education Catalog