



Sem: AU 2022 **Class Day/Time:** TuTh TBA
TBA

Room: TBA

Instructor: Dr. Dong Soo KIM

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Office Hours: By appointment

Office: Fisher Hall 558

Course Description: This class mainly focuses on the strategic applications of Customer Relationship Management to managerial decision problems. The unit of analysis in marketing activities has been shifted to individual customers. Key drivers to this phenomenon are: (i) markets became mature, so firms cannot expect that traditional mass marketing works for customers' differentiated needs and wants, and (ii) information and data technologies have been significantly developed, so marketing managers are able to take advantage of individual level transaction data at lower costs. Therefore, in order to maximize marketing performance by improving customer experience and focusing on profitable customers, firms are required to identify different types of customers especially in terms of their tastes and financial values and develop specific strategies to interact with individual customers. In this course, students will learn various customer centric metrics – such as share of category requirement (SCR), share of wallet (SW), and RFM – that quantify customer values and discuss empirical methods and applications that identify profitable customers.

Course Learning Outcomes: Having successfully passed this class, student should be capable of:

- explaining the need for customer centricity,
- understanding the role of CRM in managerial decision making,
- performing empirical analysis of customer values using Excel and SPSS,
- interpreting the results to apply to strategic decision making in real world problems, and
- understanding the ways for firms to create and enhance the sources of customer values.

Course Format: In-class discussions + Asynchronous lectures/labs/assignments/quizzes

Required Texts/Materials:

- **Textbook:** Customer Relationship Management: Concept, Strategy, and Tools
ISBN(13): 978-3662553817 **Author(s):** V. Kumar and W. Reinartz **Year:** 2018 **Publisher:** Springer
- **Articles:** The following articles are available at HBP (Harvard Business Publishing). For your convenience, the Coursepack will be provided.
 - (FC) Frei and Campbell (2001), "Pilgrim Bank (A): Customer Profitability"
 - (MS) McCarthy and Schwartz (2018), "Blue Apron: Turning Around the Struggling Meal Kit Market Leader"
 - (ND) Nunes and Dreze (2006), "Your Loyalty Program is Betraying You"
 - (RRS) Rigby, Reichheld, Shefter (2002), "Avoid Four Perils of CRM"

Evaluation Criteria:

Graded Components	% of Total	Type
Online Quizzes	24%	N ↑
Lab assignments	20%	N ↑
In-class discussion	15%	C ##
Individual assignments	6%	N ↑
Final exam	25%	N ↑
Attendance and participation	10%	O 🗨️

Requirements for each form of graded component.
Failing to follow these will represent academic misconduct. See below.

Independent Work [N ↑]: Strictly non-collaborative, original individual work. You may discuss this assignment with your instructor only. Discussions with other individuals, either in person or electronically, are strictly prohibited.

Collaboration Required [C ##]: An explicit expectation for collaboration among students either in class or outside of class (i.e. group work).

Collaboration Optional [O 🗨️]: Students are permitted, but not required, to discuss the assignment or ideas with each other. However, all submitted work must be one's original and individual creation.

Academic Conduct:

If a student is suspected of, or reported to have committed, academic misconduct in this course, I am obligated by University Rules to report my suspicions to COAM. If you have questions about the above policy or what constitutes academic misconduct in this course, please contact me. See OSU Prohibited Conduct – [Section 3335-23-04\(A\)](#)

University Policies, Services and Resources
go.osu.edu/UPolicies



Fisher Undergraduate Handbook and QuickLinks
www.bsbalinks.com



Fisher Navigator Resource Portal
www.nav-1.com



Course Format and How this Course Works:

Mode of Delivery: In each week, the course will consist of (i) 80 minutes of an in-class discussion session; (ii) one, two or three of 40-80 minutes of asynchronous lecture viewable online at your own pace; and (iii) 30-60 minutes of other content at your own pace: lab/individual assignments, quizzes and video materials.

Pace of course activities: e.g., This course is divided into **weekly modules** that are released at least one week ahead of time. Students are expected to keep pace with weekly deadlines but may schedule their efforts freely at their own pace within that time frame.

Credit hours and work expectations: e.g., This is a **1.5-credit-hour course**. According to [Ohio State policy](#), students should expect 1.5 hours per week of time spent on direct instruction (e.g., instructor content, Carmen activities, simulations, quizzes, etc.) in addition to 3 hours of homework (reading and assignment preparation, for example) to receive a grade of average.

Attendance and participation requirements: Your attendance is based on your activity and participation. The following is a summary of everyone's expected participation:

- **Participating in course activities for attendance:** You are expected to log in to the course in Carmen every week. (During most weeks you will probably log in many times.) If you have a situation that might cause you to miss an entire week of class, discuss it with me as soon as possible.
 - **In-class discussion:** You are expected to attend ALL in-class discussions.
 - **Dis-enrolled:** Any student who fails to attend an in-person class or complete an online assignment for an online course, without giving prior notification to the instructor, will be dis-enrolled after the third instructional day of the term, the first Friday of the term, or the second class meeting of the course, whichever occurs first.
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Graded Component Details

Online quizzes (24%):

There will be an online quiz in each week. The quiz covers all lectures and additional materials provided in the week. It contains several True/False, multiple-choice, and short-answer questions. All quizzes are open book: you can use all materials available (even Google) during the quiz. However, no collaboration with your classmates is permitted. You may need a calculator.

Lab assignments (20% = 3 x 3 assignments + 5 x 1 assignment + 6 x 1 assignment):

There will be five lab assignments in this course. For each assignment, one or two recorded videos will be provided to demonstrate how to conduct data analysis covered in the lectures. Lab procedures and datasets will be available in Carmen. After each lab, you will submit your answers and lab files online. Each lab is basically designed as an individual assignment, so that no collaboration with your classmates is permitted and each student must submit her/his own original answers.

In-class discussion (15% = 3 x 5 assignments):

We will have five in-class group assignments related to the cases in the class materials and the lab assignments. Students will be randomly divided in small groups (of 4 or 5 students) and asked to discuss about several managerial questions and develop CRM strategies with group members. Detailed directions for the discussion will be provided. After discussion, one of the students in each group will submit the answers to the questions via email and present their strategy.

Individual assignments (6% = 3 x 2 assignments):

Two HBR case study materials will be assigned. They are real world examples relevant to the corresponding textbook chapters. They will be discussed in class, so you are required to read and summarize the assigned case studies before class. An online submission page will be provided on Carmen with several questions that help you summarize the cases. By answering the questions online, you can understand the case studies and critically think why they are important and how you can apply the knowledge to other cases. These are also individual assignments, so that no collaboration with your classmates is permitted and each student must submit her/his own original answers.

Final exam (25%):

There will be an exam on the last class day. It will be basically a closed-book exam; however, you can use a one-page cheat sheet written by yourselves (hand-writing is strongly recommended). The exam will include all contents from the course textbook and materials, classroom discussion, and other supplemental materials provided in the course. FYI, a set of example questions will be offered before the exam. The exam will contain about 30 multiple-choice questions. You will need a calculator.

Attendance and participation (10%):

If you successfully attend and participate all activities and in-person classes, you will receive full credits of attendance and participation. If you miss an activity or a class, there will be a proportional deduction in your grade.

Grading Scale

Letter	A	A-	B+	B	B-	C+	C	C-	D+	D	E
(Points)	(4.0)	(3.7)	(3.3)	(3.0)	(2.7)	(2.3)	(2.0)	(1.7)	(1.3)	(1.0)	(0.0)
Range	100% - 93%	90% - 87%	83% - 80%	77% - 73%	70% - 67%	60% - 0%					

Note: Above percentages are % of overall points earned.

Late Assignments

Late submissions will be accepted but there will be a 10% penalty per day after the due date. The due date for each quiz/assignment will be announced with the quiz/assignment instruction in Carmen.

Faculty Feedback and Response Time

I am providing the following list to give you an idea of my intended availability throughout the course. (Remember that you can call **614-688-HELP** at any time if you have a technical problem.)

Office hours: There will be no regular office hours. Instead, you can make a meeting appointment. If you need a meeting with me, please email me.

Grading and feedback: For large weekly assignments, you can generally expect feedback within 7 days.

Email: I, as the instructor, respond to your emails Monday through Friday. If you email me during these days I will respond to you on that day or within 24 hours from the time you sent the email. If you send an email during the weekend (Saturday and Sunday) and national holidays (Memorial Day, for example), please do not expect a response from me until the following Monday/business day.

Additional Policies

Course technology:

For IT help contact the Ohio State IT Service Desk ocio.osu.edu/help servicedesk@osu.edu

1. Baseline technical skills for online courses
 - Basic computer and web-browsing skills
 - Navigating Carmen: for questions about specific functionality, see the [Canvas Student Guide](#).
2. Required Technology Skills
 - [CarmenZoom virtual meetings](#)
 - [Recording a slide presentation with audio narration](#)
 - [Recording, editing, and uploading video](#)
3. Required Equipment
 - Computer: current Mac (OS X) or PC (Windows 7+) with high-speed internet connection
 - Webcam: built-in or external webcam, fully installed and tested
 - Microphone: built-in laptop or tablet mic or external microphone
 - Mobile device (smartphone or tablet) or landline to use for [BuckeyePass](#) multi-factor authentication. It is recommended that you [register multiple devices](#) in case something happens to your primary device.
4. Required Software
 - [Microsoft Office 365](#): All Ohio State students are now eligible for free Microsoft Office 365 ProPlus through Microsoft's Student Advantage program. Full instructions for downloading and installation can be found at go.osu.edu/office365help.
 - [IBM SPSS Statistics](#): All OSU students are eligible for IBM SPSS Statistics for use on personally- or OSU-owned machine. Windows, Mac OS X, and Linux versions are currently available. To get SPSS on your personally-owned computer, you must go to the OCIO Self Service website (<https://osuitsm.service-now.com/selfservice/>) and follow the instructions below:
 - 1) Click "Sign in to your account" button and select "Log In" to log in the service.
 - 2) Click "Order Services" on the menu bar and then select "Software Services."
 - 3) Select "Site Licensed Software Request."
 - 4) Provide your name, number, email and phone number, and click "Next."
 - 5) Select "SPSS Statistics" (If you cannot find it, please scroll down to the bottom of the list).
 - 6) Select the version of the software: any version is okay, but the latest one is recommended. Please make sure whether your OS is 32-bit or 64-bit, if you are using Windows.
 - 7) Provide your license type (note: you need only one quantity), and click "Next."
 - 8) Select "Personally Owned" and click "Next."

- 9) If you are asked to consent to the terms of the license agreement, check “I Agree” (with the license terms) and click “Next.”
- 10) Review and place your order.
- 11) You will receive an email message from the IT Service Desk with a link to download software. Please keep your *License Code* in the email. You will need it during the installation.
- 12) Click the link to download software. It may take about 10 – 30 minutes.
- 13) Install the software and enjoy it.

5. Carmen Access

You will need to use BuckeyePass multi-factor authentication to access your courses in Carmen. To ensure that you are able to connect to Carmen at all times, it is recommended that you take the following steps:

- Register multiple devices in case something happens to your primary device. Visit the [Duo Mobile application](#) help article for step-by-step instructions.
- Request passcodes to keep as a backup authentication option. When you see the Duo login screen on your computer, click Enter a Passcode and then click the Text me new codes button that appears. This will text you ten passcodes good for 365 days that can each be used once.
- Download the [Duo Mobile application](#) to all of your registered devices for the ability to generate one-time codes in the event that you lose cell, data, or Wi-Fi service.

If none of these options meet the needs of your situation, contact the IT Service Desk at 614-688-4357 (HELP) and IT support staff will work out a solution with you.

Academic integrity policy (for this course):

- **Quizzes:** You must complete the quizzes yourself, without any external help or communication.
- **Written assignments:** Your written assignments, including discussion posts, should be your own original work. In formal assignments, you should follow APA style to cite the ideas and words of your research sources. You are encouraged to ask a trusted person to proofread your assignments before you turn them in—but no one else should revise or rewrite your work.
- **Reusing past work:** In general, you are prohibited in university courses from turning in work from a past class to your current class, even if you modify it. If you want to build on past research or revisit a topic you've explored in previous courses, please discuss the situation with me.
- **Falsifying research or results:** All research you will conduct in this course is intended to be a learning experience; you should never feel tempted to make your results or your library research look more successful than it was.
- **Collaboration and informal peer-review:** The course includes many opportunities for formal collaboration with your classmates. While study groups and peer-review of major written projects is encouraged, remember that comparing answers on a quiz or assignment is not permitted. If you're unsure about a particular situation, please feel free just to ask ahead of time.

Ohio State's academic integrity policy:

Academic integrity is essential to maintaining an environment that fosters excellence in teaching, research, and other educational and scholarly activities. Thus, The Ohio State University and the Committee on Academic Misconduct (COAM) expect that all students have read and understand the University's [Code of Student Conduct](#), and that all students will complete all academic and scholarly assignments with fairness and honesty. Students must recognize that failure to follow the rules and guidelines established in the University's *Code of Student Conduct* and this syllabus may constitute “Academic Misconduct.”

The Ohio State University's *Code of Student Conduct* (Section 3335-23-04) defines academic misconduct as: “Any activity that tends to compromise the academic integrity of the University, or subvert the educational process.” Examples of academic misconduct include (but are not limited to) plagiarism, collusion (unauthorized collaboration), copying the work of another student, and possession of unauthorized materials during an examination. Ignorance of the University's *Code of Student Conduct* is never considered an excuse for academic misconduct, so I recommend that you review the *Code of Student Conduct* and, specifically, the sections dealing with academic misconduct.

If I suspect that a student has committed academic misconduct in this course, I am obligated by University Rules to report my suspicions to the Committee on Academic Misconduct. If COAM determines that you have violated the University's *Code of Student Conduct* (i.e., committed academic misconduct), the sanctions for the misconduct could include a failing grade in this course and suspension or dismissal from the University.

If you have any questions about the above policy or what constitutes academic misconduct in this course, please contact me.

Other sources of information on academic misconduct (integrity) to which you can refer include:

- The Committee on Academic Misconduct web pages ([COAM Home](#))
- *Ten Suggestions for Preserving Academic Integrity* ([Ten Suggestions](#))
- *Eight Cardinal Rules of Academic Integrity* (www.northwestern.edu/uacc/8cards.htm)

Copyright Disclaimer: The materials used in connection with this course may be subject to copyright protection and are only for the use of students officially enrolled in the course for the educational purposes associated with the course. Copyright law must be considered before copying, retaining, or disseminating materials outside of the course.

Additional Resources

Statement on Title IX: Title IX makes it clear that violence and harassment based on sex and gender are Civil Rights offenses subject to the same kinds of accountability and the same kinds of support applied to offenses against other protected categories (e.g., race). If you or someone you know has been sexually harassed or assaulted, you may find the appropriate resources at <http://titleix.osu.edu> or by contacting the Ohio State Title IX Coordinator, Kellie Brennan, at titleix@osu.edu

Your mental health: A recent American College Health Survey found stress, sleep problems, anxiety, depression, interpersonal concerns, death of a significant other, and alcohol use among the top ten health impediments to academic performance. Students experiencing personal problems or situational crises during the quarter are encouraged to contact Ohio State University Counseling and Consultation Service (614-292-5766; www.ccs.osu.edu) for assistance, support and advocacy. This service is free and confidential.

Requesting accessibility accommodations for students with disabilities: If you would like to request academic accommodations based on the impact of a disability qualified under the Americans with Disabilities Act and Section 504 of the Rehabilitation Act of 1973, contact your instructor privately as soon as possible to discuss your specific needs. Discussions are confidential. In addition to contacting the instructor, please contact the Student Life Disability Services at 614-292-3307 or ods@osu.edu to register for services and/or to coordinate any accommodations you might need in your courses at The Ohio State University. Go to <http://ods.osu.edu> for more information.

Accessibility of course technology: This course requires use of Carmen (Ohio State's learning management system). If you need additional services to use these technologies, please request accommodations with your instructor.

- [Carmen \(Canvas\) accessibility](#)
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Course Schedule

The schedule is subject to change if necessary.

Week	Dates	Topics, readings, lectures, video materials, quizzes, assignments, meetings
1	TBA	Course overview & conceptual foundations of CRM <ul style="list-style-type: none"> • In-class meeting (TBA): Course introduction • Watch lecture video: Lecture 0. Introduction • Required readings: Textbook chapter 1 • Watch lecture video: Lecture 1. Conceptual foundations of CRM • Watch video material: "MetLife's Customer-Centric Transformation" by Claire Burns • Online quiz 1
2	TBA	Conceptual foundations of CRM <ul style="list-style-type: none"> • In-class meeting (TBA): Conceptual foundations of CRM discussion Traditional and customer centric metrics <ul style="list-style-type: none"> • Required readings: Textbook chapters 2 and 5 • Watch lecture video: Lecture 2. Profitability 1 – traditional metrics • Watch lecture video: Lecture 3. Profitability 2 – customer centric metrics • Online quiz 2 • Lab assignment 1: CRM metrics in Excel (Video demonstration provided)
3	TBA	Traditional and customer centric metrics <ul style="list-style-type: none"> • In-class meeting (TBA): Lab 1 discussion Customer LTV (Life-Time Value) <ul style="list-style-type: none"> • Required readings: Textbook chapter 6.1, HBR article MS • Watch lecture video: Lecture 4. Customer life-time value • Watch video material: TedxPenn – "The Customer Isn't Always Right, But Some Customers Are Better Than Others" by Pete Fader • Watch lecture video: Lecture 5. Blue Apron • Online quiz 3 • Lab assignment 2: LTV in Excel (Video demonstration provided)
4	TBA	Customer LTV (Life-Time Value) <ul style="list-style-type: none"> • In-class meeting (TBA): Lab 2 discussion RFM (Recency-Frequency-Monetary value) & Customer classification <ul style="list-style-type: none"> • Required readings: Textbook chapter 6.1 • Watch lecture video: Lecture 6. RFM analysis • Watch video material: "Clumpiness & Customer Lifetime Value" by Eric Bradlow • Online quiz 4 • Lab assignment 3: RFM analysis in Excel (Video demonstration provided)
5	TBA	RFM (Recency-Frequency-Monetary value) & Customer classification <ul style="list-style-type: none"> • In-class meeting (TBA): Lab 3 discussion Logistic regression <ul style="list-style-type: none"> • Required readings: Textbook chapters 6.2 and 6.3 • Watch lecture video: Lecture 7. Logistic regression • Online quiz 5 • Lab assignment 4: Logistic regression in SPSS (Video demonstration provided)
6	TBA	Logistic regression <ul style="list-style-type: none"> • In-class meeting (TBA): Lab 4 discussion Implementation of CRM & Loyalty program <ul style="list-style-type: none"> • Required readings: Textbook chapters 4, 10, and 11, HBR articles RRS and ND • Individual assignment 1: "Avoid Four Perils of CRM" • Watch lecture video: Lecture 8. Implementation of CRM • Watch video material: "Why Black Friday Is Bad for Business" by Pete Fader • Individual assignment 2: "Your Loyalty Program Is Betraying You" • Watch lecture video: Lecture 9. Loyalty program • Watch video material: TedxTeAro "Customer Loyalty Programmes... Why Bother!" by Lance Walker • Online quiz 6
7	TBA	Case study – Pilgrim bank <ul style="list-style-type: none"> • Required readings: HBR article FC • Watch lecture video: Lecture 10. Pilgrim bank • Lab assignment 5: Pilgrim bank (Video demonstration provided) Final exam <ul style="list-style-type: none"> • In-class Q&A session (TBA): Q&A session for case study and final exam • Final exam (TBA)