



## GLOBAL SUMMER PROGRAMME 2025

### IS446 MANAGING CUSTOMER RELATIONS WITH ANALYTICS: ASIAN INSIGHTS

Instructor Name : Rafael José BARROS BARRIOS  
 Title : Senior Lecturer of Information Systems  
 Email : rafaelbarros@smu.edu.sg  
 Office : School of Information Systems, Room 5039

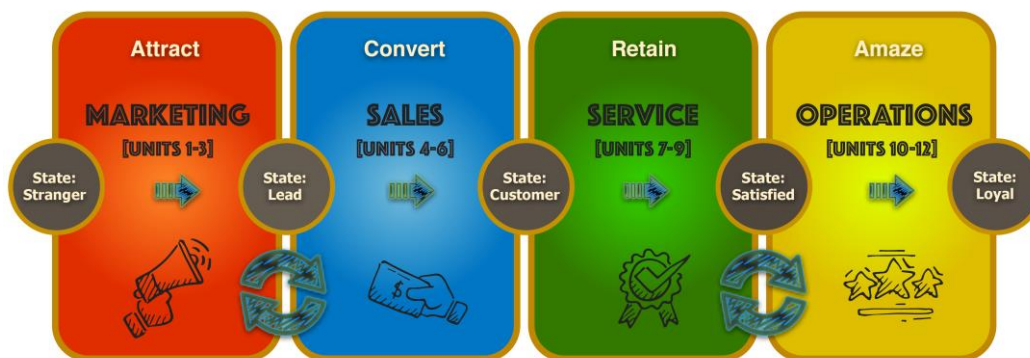


#### COURSE DESCRIPTION

The better any organization can manage the relationship with its customers, the more successful it will become. IT systems targeting the problems of dealing with customers are growing in popularity. Customer Relationship Management (CRM) is not just the use of a technology, or a hardcoded business process, it is a management strategy to help organizations understand and learn about customer behaviors, needs, preferences, and expectations to improve and maintain a strong relationship with them.

Managing Customer Relationship with Analytics: Asian Insights presents the concepts and methodologies required to execute a methodical approach to apply analytics and CRM principles into a business. The course will cover the customer-centric business culture, and the customer relationship process to attract, convert, retain, and delight customers with the help of IT tools.

#### Learning Journey



#### LEARNING OBJECTIVES

By the end of the course, students will be able to:

- Recognize the value of using **analytics** in the management of customer relations.
- Explain the **customer relationship** process.
- Understand **management strategies** to create a customer-centric business culture.
- Create **analytic dashboards** to manage the customer relationship process.
- Use appropriate **digital business tools** to attract, convert, retain, and amaze customers.
- Apply cultural and management strategies within the **Asian context**.

**PRE-REQUISITES / REQUIREMENTS / MUTUALLY EXCLUSIVE COURSE(S)**

This course does not require any pre-requisite.

**ASSESSMENT METHODS**

Type of Assessment	Weight
Chapter Individual Assessment <ul style="list-style-type: none"> <li>• Customer Acquisition Quiz (15%) – Session 7</li> <li>• Customer Success Quiz (15%) – Session 11</li> <li>• Attendance, Participation, Online Class Discussion Forums, Reflection Forms (10%)</li> <li>• Individual assessments, Asian Case Studies (20%)</li> </ul>	60%
Course Project (Teams) <ul style="list-style-type: none"> <li>• Customer Acquisition Video (10%) ~90 seconds video</li> <li>• Customer Success Project/Video (15%) ~5 minutes video</li> </ul>	25%
Digital Tools Badges and Superbadges <ol style="list-style-type: none"> <li>1. Practical component. Hands-on labs, online badges.</li> </ol>	15%
<b>Total</b>	<b>100%</b>

- Video/Project Presentations: Lesson 7, 12

**INSTRUCTIONAL METHODS AND EXPECTATIONS**

Instructional Method	Expectations
<b>Lecture: Total 12</b> <ul style="list-style-type: none"> <li>• 3 Lectures per class chapter</li> </ul>	Student must attend and participate in the seminar-room lectures
<b>In class individual and team activities</b>	Students are expected to submit the results of the activities in their folders at MS Teams or eLearn
<b>Digital Tools</b>	Graded component. In-class guided labs and outside class online learning activities – About 3h per week
<b>Team Project</b>	2 Video Presentations

**CONSULTATIONS**

- Class general communication is via Telegram group.
- Consultation scheduled via email or Microsoft Teams chat.

**RECOMMENDED TEXT AND READINGS**

- Customer relationship management: concepts and technologies. 2019. Francis Buttle and Stan Maklan.
- 100+ management models: how to understand and apply the world's most powerful business tools, Trompenaars, Alfons, author.; Coebergh, Piet Hein, 1966- author.; 2015
- Influence, New and Expanded: the psychology of persuasion. 2021. Robert Cialdini, PhD.
- Class notes, articles, and references

## UNIVERSITY POLICIES

### **Academic Integrity**

All acts of academic dishonesty (including, but not limited to, plagiarism, cheating, fabrication, facilitation of acts of academic dishonesty by others, unauthorized possession of exam questions, or tampering with the academic work of other students) are serious offences.

All work (whether oral or written) submitted for purposes of assessment must be the student's own work. Penalties for violation of the policy range from zero marks for the component assessment to expulsion, depending on the nature of the offense.

When in doubt, students should consult the instructors of the course. Details on the SMU Code of Academic Integrity may be accessed at <https://smu.sharepoint.com/sites/oasis/SitePages/DOS-WKLSWC/UCSC.aspx>.

### **Copyright Notice**

Please note that all course materials are meant for personal use only, namely, for the purposes of teaching, studying and research. You are strictly not permitted to make copies of or print additional copies or distribute such copies of the course materials or any parts thereof, for commercial gain or exchange.

For the full copyright notice, please visit <https://researchguides.smu.edu.sg/copyright>.

### **Accessibility**

SMU strives to make learning experiences accessible for all. If you anticipate or experience physical or academic barriers due to disability, please let me know immediately. You are also welcome to contact the university's accessibility services team if you have questions or concerns about academic provisions: [accessibility@smu.edu.sg](mailto:accessibility@smu.edu.sg). Please be aware that the accessible tables in our seminar room should remain available for students who require them.

## LESSON PLAN



### Part 1: Customer Acquisition Process

- **Chapter 1 - Attract:** Awareness, Marketing, Leads.
- **Chapter 2 - Convert:** Intent, Sales, Opportunities.

**Practice:** Build Customer Journey Maps, Create Analytic Dashboards, Manage the Customer Acquisition Process.

### Part 2: Customer Success Process

- **Chapter 3 - Retain:** Own, Service, Cases.
- **Chapter 4 - Amaze:** Promote, Operations, Insights.

**Practice:** Create Advanced Analytic Dashboards, manage the Customer Success Process.

LESSONS	SESSIONS
LESSON 1	<p><b>Chapter 1: Attract / Unit 1: Awareness / Voice of the Customer (VoC)</b></p> <ul style="list-style-type: none"> <li>• Course Introduction</li> <li>• CRM Overview: Customer Journey Maps. The generic customer journey (AIOp): Awareness, Intent, Own, Promote.</li> <li>• Analytics: Dashboard Introduction, the DATA process: Deduce, Acquire, Tidy, Augment.</li> <li>• Persuasion Strategies: apply persuasion within the Asian context.</li> <li>• Lab 1: Build a customer journey map.</li> </ul>
LESSON 2	<p><b>Chapter 1: Attract / Unit 2: Marketing / Voice of the Business (VoB)</b></p> <ul style="list-style-type: none"> <li>• Demand Generation Process: Marketing Business Unit.</li> <li>• Analytics [Deduce]: formulate concrete analytical questions from the usually abstract business or user question.</li> </ul>
LESSON 3	<p><b>Chapter 1: Attract / Unit 3: Lead Management / Voice of the Business (VoE)</b></p> <ul style="list-style-type: none"> <li>• Lead Generation Process: Marketing GPT (Salesforce).</li> <li>• Analytics [Acquire]: obtain the best data available to accurately answer the analytical questions.</li> <li>• Cultural Models – Asian Insights</li> </ul>
LESSON 4	<p><b>Chapter 2: Convert / Unit 4: Intent / Voice of the Customer (VoC)</b></p> <ul style="list-style-type: none"> <li>• Case Study 1: Intent - Demand generation in Asia</li> <li>• Analytics [Tidy]: clean and format the dataset for proper analysis.</li> <li>• Cultural Maps: strategies for management, teamwork, and relations.</li> </ul>
LESSON 5	<p><b>Chapter 2: Convert / Session 5: Sales / Voice of the Business (VoB)</b></p> <ul style="list-style-type: none"> <li>• CRM: The sales pitch / Salesforce Objects</li> <li>• CRM: B2B Sales Process / Sales vs Marketing organizations</li> <li>• Analytics [Augment]: Forecast Introduction</li> </ul>
LESSON 6	<p><b>Chapter 2: Convert / Session 6: Opportunities / Voice of the Employee (VoE)</b></p> <ul style="list-style-type: none"> <li>• CRM: Trends and Opportunity Management (closing deals!)</li> <li>• Analytics [Augment]: Forecast Methods</li> </ul> <p><b>TBC: Salesforce Office Visit</b></p>

LESSON 7	<p><b>Chapter 3: Retain / Unit 7: <i>Own</i> / Voice of the Customer (VoC)</b></p> <ul style="list-style-type: none"> <li>• Customer Models by Fons Trompenaars.</li> <li>• Consistent Quality</li> <li>• SERVQUAL Framework</li> <li>• <b>Customer Acquisition Quiz (15%)</b></li> </ul> <p><b>Team Acquisition Video Presentation</b></p>
LESSON 8	<p><b>Chapter 3: Retain / Unit 8: <i>Service</i> / Voice of the Business (VoB)</b></p> <ul style="list-style-type: none"> <li>• CRM: Consistent Service</li> <li>• Value Proposition</li> <li>• Case Study 2: Handmade with Love. Anna Lim of The Soup Spoon discusses the importance of investing in staff engagement and keeping true to your brand DNA.</li> <li>• Analytics: Customer Satisfaction Index of Singapore - Institute of Service Excellence, SMU.</li> </ul>
LESSON 9	<p><b>Chapter 3: Retain / Unit 9: <i>Support</i> / Voice of the Employee (VoE)</b></p> <ul style="list-style-type: none"> <li>• CRM: Consistent Support</li> <li>• IT Service Management - ITIL version 4.0</li> </ul>
LESSON 10	<p><b>Chapter 4: Amaze / Unit 10: <i>Loyalty</i> / Voice of the Customer (VoC)</b></p> <ul style="list-style-type: none"> <li>• CRM: Loyalty</li> <li>• Consistent Positive Experiences</li> <li>• Analytics: Measuring Loyalty</li> </ul>
LESSON 11	<p><b>Chapter 4: Amaze / Unit 11: <i>Operations</i> / Voice of the Business (VoB)</b></p> <ul style="list-style-type: none"> <li>• <b>Customer Success Quiz (15%) – Session 11</b></li> <li>• Strategy and Governance – Business Process Management (BPM)</li> <li>• Objectives and Key Results / Jobs to be done</li> </ul>
LESSON 12	<p><b>Chapter 4: Amaze / Unit 12: <i>Insights</i> / Voice of the Employee (VoE)</b></p> <ul style="list-style-type: none"> <li>• Course Review, Insights and Trends</li> <li>• Presentations Feedback</li> </ul> <p><b>Team Customer Success Project Presentation</b></p>