Unit Outline (Higher Education)

Institute / School:	Institute of Innovation, Science & Sustainability
Unit Title:	CUSTOMER RELATIONSHIP MANAGEMENT USING SALESFORCE
Unit ID:	HENAI5000
Credit Points:	15.00
Prerequisite(s):	Nil
Co-requisite(s):	Nil
Exclusion(s):	Nil
ASCED:	080501

Description of the Unit:

Customer Relationship Management (CRM) serves to enhance the customer experience and plays a critical role in an organisation's success. CRM systems enable monitoring of customer interactions, sales and service; and, forecasting and analysis of customer trends and behaviour. This unit will focus on optimum use of an organisation's Enterprise Management System and the business, technical and practical aspects of CRM systems using the premier platform, Salesforce. This unit is made up of two modules:

- Module 1 covers Information Systems and the in and outs of Customer Relationship Management including implementation.
- Module 2 is the Salesforce Administration training offered by Salesforce Trailhead Academy. The module will introduce the business, technical, and practical aspects of Customer Relationship Management (CRM) Systems using the # 1 CRM platform, Salesforce CRM, including how the platform can be customised to suit organisation's needs. Module 2 also provides a fast track to the Salesforce Certified Administrator certification and has been designed to include Live coaching, Personalized email support, Limited impact on your workday/week, One practice exam voucher, and One certification exam voucher.

Grade Scheme:	Graded (HD, D, C, P, MF, F, XF)

Work Experience:

No work experience: Student is not undertaking work experience in industry.

Placement Component:	No

Supplementary Assessment: Yes

Where supplementary assessment is available a student must have failed overall in the Unit but gained a final mark of 45 per cent or above, has completed all major assessment tasks (including all sub-components where a task has multiple parts) as specified in the Unit Description and is not eligible for any other form of supplementary assessment

Course Level:

Level of Unit in Course	AQF Level of Course					
	5	**6**	**7**	**8**	**9**	**10**
Introductory						
Intermediate			✔			
Advanced						

Learning Outcomes:

Knowledge:

K1. Explain CRM business process and the impact of CRM on the organisation.

K2. Describe CRM systems, component and architecture.

K3. Compare the CRM system life cycle with other enterprise systems.

K4. Describe various features and capabilities of Salesforce CRM.

Skills:

S1. Identify key integration points between CRM and other enterprise systems.

S2. Compare the main suppliers, products, and application domains of enterprise - wide packages.

S3. Navigate and personalise the Salesforce experience.

S4. Structure, manage and maintain data effectively for high value reports and dashboards.

S5. Set up and maintain features for optimum user experience and trouble shoot issues.

S6. Maintain and import clean data and create high-value reports and dashboards.

Application of knowledge and skills:

A1. Create a CRM business case to address a business need or enhancement.

A2. Create a customised Salesforce environment including business processes user interface design features such as page layouts, fields and tabs.

A3. Apply the appropriate security controls.

Unit Content:

- Information Systems and Enterprise Systems
- Customer Relationship Management and Supply Chain Management systems
- CRM Strategy and Benefits
- CRM Vendor and Software selection process
- CRM Architecture and Database Structure
- CRM Data management and security
- CRM business processes
- Business Intelligence and performance management
- Salesforce Overview

- Data Security in Salesforce
- Salesforce Customization, Automation, and Applications
- Data Management & Reporting with Salesforce

FEDTASKS

Federation University Federation recognises that students require key transferable employability skills to prepare them for their future workplace and society. FEDTASKS (**T**ransferable **A**ttributes **S**kills and **K**nowledge) provide a targeted focus on five key transferable Attributes, Skills, and Knowledge that are be embedded within curriculum, developed gradually towards successful measures and interlinked with cross-discipline and Co-operative Learning opportunities. *One or more FEDTASK, transferable Attributes, Skills or Knowledge must be evident in the specified learning outcomes and assessment for each FedUni Unit, and all must be directly assessed in each Course.*

FEDTASK attribute and descriptor		Development and acquisition of FEDTASKS in the Unit	
		Learning Outcomes (KSA)	Assessment task (AT#)
FEDTASK 1 Interpersonal	Students will demonstrate the ability to effectively communicate, interact and work with others both individually and in groups. Students will be required to display skills in-person and/or online in: • Using effective verbal and non-verbal communication • Listening for meaning and influencing via active listening • Showing empathy for others • Negotiating and demonstrating conflict resolution skills • Working respectfully in cross-cultural and diverse teams.	K1 - K4, S1-S2, A1	AT1
FEDTASK 2 Leadership	Students will demonstrate the ability to apply professional skills and behaviours in leading others. Students will be required to display skills in: • Creating a collegial environment • Showing self -awareness and the ability to self-reflect • Inspiring and convincing others • Making informed decisions • Displaying initiative	Not applicable	Not applicable
FEDTASK 3 Critical Thinking and Creativity	Students will demonstrate an ability to work in complexity and ambiguity using the imagination to create new ideas. Students will be required to display skills in: • Reflecting critically • Evaluating ideas, concepts and information • Considering alternative perspectives to refine ideas • Challenging conventional thinking to clarify concepts • Forming creative solutions in problem solving	Not applicable	Not applicable

FEDTASK attribute and descriptor		Development and acquisition of FEDTASKS in the Unit	
		Learning Outcomes (KSA)	Assessment task (AT#)
FEDTASK 4 Digital Literacy	Students will demonstrate the ability to work fluently across a range of tools, platforms and applications to achieve a range of tasks. Students will be required to display skills in: • Finding, evaluating, managing, curating, organising and sharing digital information • Collating, managing, accessing and using digital data securely • Receiving and responding to messages in a range of digital media • Contributing actively to digital teams and working groups • Participating in and benefiting from digital learning opportunities	S3-S6, A2	AT2
FEDTASK 5 Sustainable and Ethical Mindset	Students will demonstrate the ability to consider and assess the consequences and impact of ideas and actions in enacting ethical and sustainable decisions. Students will be required to display skills in: • Making informed judgments that consider the impact of devising solutions in global economic environmental and societal contexts • Committing to social responsibility as a professional and a citizen • Evaluating ethical, socially responsible and/or sustainable challenges and generating and articulating responses • Embracing lifelong, life-wide and life-deep learning to be open to diverse others • Implementing required actions to foster sustainability in their professional and personal life.	Not applicable	Not applicable

Learning Task and Assessment:

Learning Outcomes Assessed	Assessment Tasks	Assessment Type	Weighting
K1 - K4,S1 &S2, A1	Students will demonstrate their understanding of CRM and create a business case for CRM.	Report/Moodle Lessons	50%-60%
S3-S6, A1&A2 , A3	Students will earn badges for each completed module/exercise in Salesforce.	Tool-based exercises submitted via Moodle Lessons	40%-50%

Adopted Reference Style:

APA

Refer to the library website for more information

Fed Cite - referencing tool