



Detailed Course Plan for CRM Postgraduate Studies

Group A: Strategy, System, CRM Processes | 40hrs *(Typical order of subjects in the plan within the group)*

Strategy, System, Change Management - Three Dimensions of CRM

1. The Three Dimensions of CRM:
 - Strategy
 - System
 - Change Management
2. External Barriers to CRM Implementation
3. Internal Barriers to CRM Implementation
4. Planning CRM Implementation:
 - Scope of implementation
 - Business strategy
 - Organizational culture
 - Customer strategy
 - Value creation chain

CRM Processes and Their Modeling

1. Basic CRM Processes:
 - Elements and quality of the offer
 - Lead management
 - Cross-/up-selling
 - Loyalty management
 - Anti-churn management
2. CRM in Social Media (SCRM):
 - Goals achievable through social media
 - Use of social media in CRM processes
3. Process Modeling:
 - Basic design requirements
 - Selecting processes for modeling
 - Process modeling

Business and Technical CRM Project

1. Determining Benefits Associated with CRM Implementation:
 - General benefits associated with CRM
 - Quantifiable benefits and their relation to financial benefits
2. Capabilities of CRM Systems:
 - Operational tasks
 - Analytical tasks
3. CRM System Requirements:
 - Basic challenges in creating technical requirements
 - Detailed creation of technical requirements
4. Implementing a CRM Project:
 - Technical implementation project
 - Implementation project among end users

Case Study of CRM and ERP Systems Implementation

1. Implementation of a CRM System in the Sales and Service Network of an Automotive Company
2. Scope of Implementation:
 - Multi-stage organizational preparations
 - Integration with other systems and other technical challenges
 - Maintenance and development of the system
 - Implementation programs and multi-brand re-launch in the sales network
3. Best Practices from Implementations in Other Organizations

Choosing an Implementation Partner, Implementation Contract, and Data Protection

1. Choosing an Implementation Partner and Implementation Contract:
 - Criteria for selecting a supplier
 - Special clauses in the license and implementation agreement
 - Analysis of agreement templates for security gaps
 - Detailed definition of needs
2. Personal Data Protection:
 - Basic concepts
 - Duties of the Information Security Administrator
 - Procedures and documentation
 - Registration application
 - Defining data security requirements in the new system

Workshops on Business Programs Supported by CRM Systems

1. Familiarizing with a CRM Implementation Case Study
 2. Working on a Project Task Solution within Own Group
 3. Review of Solutions Developed by Various Groups
 4. Summary of the Case Study and Entire Studies
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Group B: Marketing Use of Customer Data | 24hrs

(Typical order within the group)

Business Analytics

1. Defining Business Objectives for Analytical Activities:
 - Bipolar analysis in terms of achieving marketing goals (whether my action is likely to succeed) and its effectiveness (whether my actions have brought the expected result)
2. Classification of Analytical Tools and Their Application in Marketing Projects:
 - Discussion of the library of possible analyses – CX/UX/metrics/others
3. Preparing Tasks for the Analyst:
 - Formulating business questions
 - Ongoing monitoring (verification of algorithms, queries)
 - Initial reasoning and evaluation of questions
4. Complementing Knowledge from External Sources:
 - Discussion of available external data and legal aspects of its use

Marketing Automation (MA)

1. MA Tools and Processes:
 - Communication modules within CRM platforms
 - Defining goals and processes subject to communication automation
2. Building an MA Team:
 - Criteria for appointing team members
3. Linking Business Processes and Communication Paths:
 - Mapping processes and paths
 - Defining requirements for the form (content) and method (how to deliver) of communication
 - Discussion of potential risks in processes
4. Creating Dedicated Content for the Adopted Communication Strategy:
 - Preparing the content specification for selected processes

Current Loyalty Strategies

1. Servitization and Product-Service Systems (PSS) as Components of CRM and Loyalty Strategies
 - Transactional vs. Relational approaches
 - VAS (value-added services) as an indispensable element of CRM
 - Case studies: market practices from Poland and abroad (Otomoto, TZMO, Check Business Tools)
2. Customer Intelligence – The Foundation of Effective CRM and Value Proposition Building in B2B Relationships
 - What is Customer Intelligence?
 - Customer Intelligence vs. Business Intelligence
 - Key tools supporting Customer Intelligence
 - Application of CI within CRM
 - CI as a value proposition in B2B activities – examples (Mastercard)
3. Unconventional Loyalty Tactics – Innovations Beyond the Standard Framework
 - Gamification as a tool for customer engagement
 - Co-op membership as a strategy for relationship building
 - Inspirations from local and international markets (Japan Railway, BPS Group, REI Co-Op)
4. The Role of Fintechs in Shaping Modern Loyalty Programs
 - PSD2: the beginning of a new era in financial services
 - The importance of payments as a key link in the loyalty chain
 - Examples of synergy between financial technology and loyalty (Xsolla, Chile)
5. Customer Retention Practices in the Business Environment
 - Popular CRM tools supporting customer retention
 - Use of multi-merchant platforms as experience integrators

AI Tools: Potential and Limitations in the Context of GDPR

1. Overview of AI Tool Applications in Business Processes
Including areas such as marketing, data analysis, automation, and customer service.
2. Key Types of Data Used by AI Tools and Their Importance for Organizations
In the context of security and control over data processing.
3. Challenges Related to the Use of AI Tools Operating Outside the EU/EFTA
Including issues of data localization, outsourcing of processing, and the limited transparency of providers.

Social Media use in Customer Relationship Management

1. Internet by the Numbers
 2. Customer Expectations vs. What Brands Think about Expectations
 3. Social Media Strategy (B2C Market)
 4. Social Media Strategy (B2B Market)
 5. Social Media CRM
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Group C: Project Management | 80hrs

(Typical order within the group)

Basics of Project Organization and Management

1. Overview of Project Management Methodologies:
 - PMBOK - Project Management Institute
 - Prince 2 - Office for Government Commerce (OGC)
 - IPMA – International Project Management Association
 - Agile
2. What is a Project:
 - Characteristic features of projects
 - Six components of process excellence
3. Project and Portfolio Management:
 - Project manager and stakeholders
 - Project structural plan and its scheduling

Application of IT Systems in Organization

1. The Role of Information in Management Systems
2. IT Ecosystem in Enterprises
3. Architecture of Integrated IT Systems
 - MRPII/ERP-class IT systems
4. Customer Relationship Management Systems – CRM class
 - Integration in ERP systems, SCM class systems, PLM systems
5. Projects in Data Analytics – Big Data vs. Business Intelligence
6. Responsive and Mobile Solutions
7. Building a Community around the Company: Social Media vs. Dedicated Solutions

Communication in IT Project Teams

1. Building Teams in IT Projects
2. Internal Communication Tools
3. Support Systems and Their Effective Use in Project Documentation and Communication

IT Tools Supporting Project Management

- Case study sessions in the computer lab – scheduling and allocating resources to various project stages using MS Project and other PM tools

Risk Management in Projects

1. Identifying Risks
2. Classifying Risks
3. Estimating the Impact of Risks
4. Preventive Risk Management
5. Project Risk Management

Accredited Certification Training AGILE PM® and AGILE BA®



1. Concept of Project and Team Governance in an Organizational Environment:
 - Strategy
 - Portfolio governance
 - Program and business activity areas
2. Agile Organization:
 - Definition
 - Advantages and disadvantages of the agile approach to project management
 - Advantages and disadvantages of the waterfall approach to project management
 - Criteria for choosing a methodology for a specific project
3. Anatomy of a Project:
 - Principles
 - Phases of the project lifecycle
 - Management products
 - Business products
 - Role and responsibility structures at the Project and Solution Development Team level
 - Methods for engaging stakeholders
4. Agile Project Management Practices:
 - Selected business analysis techniques
 - Ways to introduce agile project management methodology into the organization
5. Exam Preparation:
 - Discussion of the exam process
 - Solving sample tests

Change Management

1. Cultural Conditions for Change:
 - Organizational culture pyramid
 - Typology of organizational culture values
 - Competing values model
 - Organizational culture research
 - Managerial roles in organizational culture
 - Boundary cultures
 - Integral concept of organizational culture (AQAL)
 2. Designing and Implementing Changes:
 - Components of the change project
 - Organizational experience in change
 - Organizational complexity, complexity, and depth of change
 - Preparing the change project – 10CION model
 - Resistance to change
 - Conducting change
 3. Cooperation with Employees in the Change Process:
 - Learning environment
 - Action learning
 - Diagnosing employee needs and deficits
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Group D: Team Management | 40hrs

(Typical order within the group)

Personal Development of Project Manager – Acting Workshops

1. Voice Emission and Voice Awareness
 - Voice warm-up
 - Awareness of breathing and voice production
 - Proper use of voice during speaking
 - Confidence in voice
2. Self-presentation
 - Body Awareness during Presentations
 - Gestures (Body Language)
 - Awareness of Gestures
 - Appropriate Presence during Self-presentation
 - Combating Stress when Speaking in Front of an Audience

Psychology in Management

1. Group and Group Process, Team Problems, and Efficiency
2. Individual's Place in a Team: Roles, Talents, Behaviors
3. Leadership Styles and Their Proper Selection
4. Motivation and Encouragement in the Context of Employee Autonomy and Engagement
5. Providing support, intrinsic motivation, persuasion, and participation

Coaching in Project Management - Workshops

1. Choosing a Motivational Model Based on Organizational Culture and Individual Employee Characteristics
2. Techniques for Influencing People and Inspiring Motivation to Undertake the Challenge of Change (organizational, personal behavior)
3. Organizing Consultation and Development Meetings for the Team
4. Conducting Disciplinary and Motivational Conversations with Team Members who Pose Communication Barriers

Training and Motivation of System Users

1. Basic Assumptions of Consultation and Development Programs (PKR)
2. Choosing Implementation Models Based on PKR Results
3. Basic Principles of Effective Training
4. Management Tools – Ensuring Implementation Continuity
5. Building Implementation and Control/Support Programs Based on Observations of Implementation Effects
6. Using Tools to Monitor the Continuity of IT System Implementation
7. Intervention Techniques – Maintaining Implementation Continuity

This document outlines a comprehensive plan for a CRM-focused postgraduate program, emphasizing strategic management, process modeling, business analytics, project management, and team leadership skills. It is designed to prepare students for the challenges of implementing and managing CRM systems effectively within various organizational contexts.