How to Offer a CRM Certificate at Your University - Including Curriculum Overview, Job Placement and Program Process

Pamela McGee
Department of Technology
Minnesota State University, Moorhead
1104 Seventh Avenue South
Moorhead, MN 56563
Email: mcgeepa@mnstate.edu
PH: 218.477.2466

Christy Spokely
eXtremeCRM
3304 44th Ave. S
Fargo, North Dakota 58104
Email: cspokely@extremecrm.com

Abstract: This article provides elaborate preparations to offer a Customer Relationship Management (CRM) certificate at your university. The technical process includes five interrelated phases: 1). Build Relationships and Establish Connections. 2). Establish a Cohesive Vision and Determine the Business Model. 3). Scope the Project. 4). Plan the Work. 5). Execute the Plan. This methodology, utilized by Minnesota State University—Moorhead (MSUM), launched the CRM certificate program. Furthermore, the curriculum package outlines the key components related to the CRM certificate program.

INTRODUCTION

Customer relationship management (CRM) is a software system utilized by organizations to manage their interactions with current and future customers. It involves using technology to organize, automate, and synchronize sales, marketing campaigns, customer service, technical support and much more. Interestingly, every time you interface with a business, they are using CRM.

Microsoft provides a CRM system for businesses and is investing significantly to grow market share. For students, this means extraordinary opportunities in a fast growing industry. As a CRM consultant, students will have the opportunity to shape how a business interacts with and provides a stellar experience for their customers. CRM consultants are in great demand within Microsoft Dynamics CRM Partner organizations who offer CRM service, support, education and add-ons.

Minnesota State University—Moorhead (MSUM) implemented a certificate (Extreme CRM Certified Consultant) program that prepares students to land a great career working with Microsoft Dynamics CRM. The program educates students on the product as well as how to implement the products for an organization using conventional project management methodology. Participants emerge from these courses with a certificate that signifies to employers you have received knowledge in preparation for a CRM consulting role.

In result of implementation and beneficial outcomes, MSUM is analyzing how they can use the CRM certificate to execute other possible industry programs. Moreover, determining how the process can be duplicated with universities across the globe. The CRM certificate process truly proclaims excellence, when relationships are explicit between universities and industry professionals.

HISTORY

Minnesota State University—Moorhead (MN) vision is to create a rigorous education that assists students in lifelong learning and launching their career. In Fall 2014, The College of Business and Industry, (AASCB accredited) transformed into the College of Business and Innovation. The transformation was much more than a name change. It was a philosophy shift to create unique, sustainable, and industry demanded programs. As a part of fulfilling the College of Business and Innovation vision, administration, faculty, and industry identified key ways to meet workforce development needs in the region. Concurrently, Microsoft launched its annual strategic plan, which identified CRM as one of their major areas of growth. Concurrently, eXtremeCRM, an organization that hosts annual conferences in North America and Europe for Microsoft Dynamics CRM, identified a major need within their community (CRM Companies selling and building CRM solutions) which was finding and hiring skilled talent. The information provided by Microsoft, eXtremeCRM, surveys , focus groups, and individual meetings, indicated a workforce shortage and increasing labor costs for experienced CRM professionals. CRM talent was being head hunted aggressively, raising the salary expectations and creating budget constraints in the CRM companies. Concurrently, young professionals leaving college were not being exposed to, nor did they know what CRM was— making it difficult and costly for CRM companies to hire young professionals.

To help solve the CRM talent shortage, MSUM and eXtremeCRM partnered to create a 16 week CRM certificate program for undergraduate students at Minnesota State University Moorhead, with the promise that all students in the program earning a C or better in all content areas would be guaranteed a job interview. With a vision of designing a curriculum that uniquely prepares students for consulting positions within this fast growing industry, these groups came together to deliver on the first round of this vision in less than four months. In Spring 2015, the certificate program launched with 24 students, including two faculty,taking three eight week courses designed and developed by industry and educators. Benefits of the program include students earn nine credits towards their degree, they earn a university sponsored certificate and they earn aneXtremeCRM Certificate. The purpose of this curriculum package is to outline the key components of the CRM certificate program and process.

METHODOLOGY

To launch the CRM certificate program, the project methodology included five phases—Phase 1: Build Relationships and Establish Connections; Phase 2: Establish a Shared Vision and Determine the Business Model; Phase 3: Scope the Project; Phase 4: Plan the Work; and Phase 5: Execute the Plan.

PHASE 1: BUILD RELATIONSHIPS AND ESTABLISH CONNECTIONS

To establish connections, the Dean funded faculty attendance at the Annual Dynamic Academic Alliance Conference. This was critical because it allowed faculty members to learn the product, meet Microsoft employees, mingle with university professionals, and listen to industry needs. The most important reason for the conference is that Microsoft does a great job at creating excitement and generating faculty "buy-in" to support and lead the curriculum. The next step was establishing a vital industry partnership that manages the placement process and helps secure adjunct faculty. In this case, the vital industry partner was eXtremeCRM, a company with deep connections into thousands of partners globally looking for young CRM professionals. To create your work team, here are the fundamental questions that deserve thought:

1. Who from the university can champion the work?
2. Who has the best access to industry connections?
3. Who from industry can champion the work?
4. Who from Microsoft can be involved to assist in the work?

In answering those four questions, MSUM faculty members partnered with eXtremeCRM (#2 above: Access to industry connections) to build a vision and a business model beneficial to both parties. Without a win/win for both parties, the curriculum package would not be successful.

PHASE 2: ESTABLISH A SHARED VISION AND DETERMINE THE BUSINESS MODEL

MSUM and eXtreme CRM agreed on a business model where the University earns tuition dollars and eXtremeCRM earns placement dollars and industry registration fee dollars. eXtremeCRM assisted in finding the adjunct faculty; however, the university hired and paid the faculty. eXtremeCRM and faculty jointly developed curriculum. The University provided the location, logistics and technology and eXtremeCRM provided the process for hiring and interviewing students through online data collection and placement tools. Faculty from the business department, project management department, and operations management department, in partnership with eXtremeCRM created the vision. The MSUM / eXtremeCRM vision was to develop a work force for the CRM Industry. Part of establishing the vision was to determine the program's primary audience. In this case, MSUM/Extreme CRM chose students as the primary audience and industry as the secondary audience.

PHASE 3: SCOPE THE PROJECT

The project included: 1). Curriculum Design and Hiring the Correct Instructor; 2). Registration and Payment Processes; 3). Marketing Materials and Marketing Plans; 4). Placement Services

Curriculum Design and Hiring the Correct Instructor

Curriculum design and hiring the right instructor was handled jointly by eXtremeCRM and MSUM. eXTremeCRM surveyed (through focus groups, conference forums, 1:1 phone calls) their partners (employers of CRM talent) to determine the industry competencies for the young CRM Consultant.Project Management, Introduction to CRM Product, and CRM consulting were the top three industry requests. Once the highlevel curriculum was vetted, both parties searched for Adjunct Faculty with teaching experience, CRM knowledge, and industry experience. An employee of Microsoft, an industry professional, and a university teacher jointly develop the curriculum. The adjunct with experience at Microsoft in the CRM product line was selected to teach the BUS 390 Introduction to CRM product. An industry professional was selected to teach the BUS 490 CRM Consulting. A university professor currently teaching Project Management was selected to teach PMGT 300 Introduction to Project Management and Scheduling.

Registration and Payment Process

Students registered for the already established online Project Management course, a BUS 390 Introduction to CRM product (first eight weeks), and a BUS 490 CRM Consulting Class (second eight weeks). To accommodate instructor availability, minimize conflict with established course times, and to meet student requests, all parties mutually agreed that the certificate be offered on Fridays from 8:30-11:30am, hybrid for 16 weeks, with an eight week online Project Management class (first eight weeks). The student earned nine credits, which is the minimum required for a university certificate, and also met the requirements for the eXtremeCRM Student Dynamics Certificate. Students funded the certificate with their financial aid because the classes were used as electives towards their bachelor's degree, whether the degree was Accounting, Marketing, Business Administration, or Project Management. The records office and faculty handled the registration processes. eXtremeCRM managed the registration process for industry professionals making it appear much more like a training class, not a university course.

Marketing Materials

Marketing materials were developed to educate faculty and students on the benefits and structure of the program. The lead faculty member delivered faculty presentations and student presentations (in already established classes). Flyers were created and open forums scheduled to answer student questions. eXtremeCRM created the original brochure. MSUM faculty created the presentation materials and both worked together to create a solid marketing platform to educate faculty, industry, administrators and students.

Placement Services

eXtremeCRM created a placement process entailing online data collection, student job search preparation, and interviewing processes. Interview, resume writing and other job search preparation skills were built into the curriculum and jointly sponsored by eXtremeCRM and MSUM Career services. eXtremeCRMpre-interviewed students and gathered information from employers in search of hiring qualified students with prospective employers.

PHASE 4: PLAN THE WORK

During the planning phases, there were two key deliverables—confirming financial agreements and developing curriculum. The financial agreements were:
1. MSUM assumed the costs for facilities, classroom management system, and registration logistics.
2. MSUM funded the adjuncts with the standard adjunct rates.
3. eXtremeCRM earned revenue on student placement.
4. eXtremeCRM earned revenue by brokering the registration processes for industry professionals and bulk registering them at MSUM.
5. MSUM earned tuition revenue.

The Curriculum Committee (including eXtremeCRM, Microsoft employee, and university faculty) detailed the 16 week program by outlining eight CRM Product Modules, eight Consulting Modules and eight Project Management modules. (See Appendix A)

PHASE 5: EXECUTE THE WORK

During the execution phase, the faculty champion secured the right technology for remote faculty and face to face faculty and utilized the campus Instructional Technology services for classroom management software training. In conjunction, eXtremeCRM built the placement database with industry and student data and also built the interview process.

RESULTS

The response from faculty, industry, and students was overwhelming. The break-even registration goal was 10 students. The current program has 24 students and a waitlist. The curriculum, well received by students, industry and faculty, is rigorous, industry based, and steeped in solid pedagogical standards. There are over 50 partners interested in interviewing the 24 students for internships or full time positions, pending graduation dates. The program provided unique benefits to students, industry and education:
1. Curriculum is designed to provide unique knowledge and skills to prepare students for placement in industry with high paying jobs in a high growth market.
2. Classes count as credit towards a degree which is covered by financial aid and applied towards their degree electives.
3. Students gain a University issued certificate which will appear on their transcript.
4. Students gain recognizable industry certificates. (The eXtremeCRM Consultant Certificate)

5. Students are provided with placement services to connect them with great industry employers.
6. Hiring Partners have confidence that students coming through this program are well equipped to be successful as a CRM consultant or technical expert because they have contributed to the content.

NEXT STEPS AND CONCLUSION

The next steps are to determine the annual cycle of the certificate, take the entire curriculum online while retaining a face to face presence, determine how this process can be duplicated with universities across the globe with eXtremeCRM, and offer the program more aggressively to industry professionals. MSUM is also analyzing how they can use this CRM certificate process to launch other student and industry programs, like a Business Analytics Certificate. Inconclusion, the CRM certificate process is a true snapshot of how great things can result when partnerships and relationships are fostered between universities, industry professionals and software geniuses like Microsoft.

APPENDIX

Appendix A: Curriculum Overview Draft

PMGT 300 Introductions to Project Management and Scheduling

Module 1: Project Beginnings
Module 2: Scope the Work
Module 3: Stakeholder Management
Module 4: Project Leadership Style and Team Development
Module 5: Plan the Work and MS Project
Module 6: Manage the Work
Module 7: Close or Transfer the Work

BUS 390 Introductions to CRM Product

Module 1: Introduction to the CRM Industry and Terminology
Module 2: Introduction to the CRM Profession
Module 3: Introduction to Sales Force Automation and Sales Cycle
Module 4: Advanced Sales Force Automation
Module 5: Introduction to Marketing Campaigns
Module 6: Advanced Marketing Campaigns
Module 7: Basic Customization
Module 8: Basic Customization

BUS 490 CRM Consulting

Module 1: What is a Consultant? Different Roles for CRM Professionals
Module 2: Implementation Methodology
Module 3: Implementation Methodology
Module 4: Implementation Methodology
Module 5: Managing the Project Budget, Change Orders and Timelines
Module 6: Communication on a Consulting Project
Module 7: The Paperwork: Billing and Utilization Practices
Module 8: Selling the Customer More Features