### SESSION PLAN

**COURSE:** ABE Level 6 Strategic Marketing Relationships

**ELEMENT:** Element 4 – Strategic relationship marketing

## **LEARNING OUTCOME 4**

**4. Critically discuss the place of relationship marketing in strategy (Weighting 25%)**

4.1 Evaluate and explain why relationship marketing is a strategic approach to marketing

4.2 Evaluate relationship marketing planning and implementation issues in strategic relationship marketing

**NUMBER OF SESSIONS:** Two - approximately twelve to fourteen hours in total, plus self-study.

**SESSION TOPICS:** Session 1: Strategic relationship marketing

 Session 2: Relationship marketing planning and implementation issues in strategic relationship marketing

**Note to tutors: this is the recommended session plan for learning outcome 4, element 4 of ABE Level 6 Strategic Marketing Relationships. You should follow the plan, using the resources (referenced as ‘slides’ here) and activities provided. It is important to enhance all sessions with local examples and case studies, involving the learners ACTIVELY wherever possible.**

### SESSION 1: Strategic relationship marketing

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Approx.****Duration** | **Topic** | **Tutor Activity** | **Slides** | **Learner Activity** | **Formative Assessment** |
| 6 -7 hours | Introduction to session and assessment criterion | Assessment criterion 4.1Use **6USMR Tutor Presentation E4.pptx**  | 1-4 | Listen and ask questions as appropriate |  |
| Value proposition | Creating value: explain creating value involves understanding customer needs and the forces driving demand, as well as how well the competition serves these needs. Then, developing a product and service package that provides clear and superior value for the customer and communicating the value to existing and potential customers.Facilitate **Activity 1.** Debrief this with each pair presenting their value proposition. | 5 | **6USMR LO4 E4 Activity 1:** Activity in pairsRead the infographic on how to create effective value propositions: <https://blog.hubspot.com/marketing/write-value-proposition>Imagine you are the Marketing Manager for a challenger electricity supplier in your country. Your customer relationship strategy is to offer great service and to lower customer prices, the longer they remain with you. So, if a customer commits to a 2 year deal, they receive a 2% price discount, 3 year deal, 3% etc up to 5% discount with a 5 year deal.Write a value proposition for this brand. | **6USMR LO4 E4 Activity 1: Value proposition** |
| Customer lifecycle | Explain the steps in the customer lifecycle: reach, acquisition, conversion, retention and loyalty. Facilitate **Activity 2.** Debrief this with each group presenting examples. | 6 | **6USMR LO4 E4 Activity 2**: Small group activity.Read the article: <https://www.referralsaasquatch.com/7-customer-lifecycle-campaign-examples/>This contains examples of marketing campaigns at different stages of the customer lifecycle. Research other examples on the internet of marketing campaigns that relate to reach, acquisition, conversion, retention and loyalty. | **6USMR LO4 E4 Activity 2: Customer life cycle** |
| CRM | Definition of CRM: explain CRM refers to practices, strategies and technologies that companies use to manage and analyse customer interactions and data throughout the customer lifecycle, with the goal of improving business relationships with customers, assisting in customer retention and driving sales growth.Philosophy of CRM: explain this is that business success derives from the creation of customer value, which is achieved through the management and development of customer relationships involving all key stakeholders.Facilitate **Class discussion.**Facilitate **Activity 3.** Debrief this taking feedback from each group. | 7-8 | Contribute to **Class discussion.**In what ways is CRM is aligned with holistic marketing orientation?How is CRM an enabler of relationship marketing?**6USMR LO4 E4 Activity 3**: Activity in small groupsResearch and identify an organisation that has successfully implemented a CRM strategy in your country and evaluate the benefits this has brought. | **6USMR LO4 E4 Activity 3: CRM strategy** |
|  | CRM and relationship marketing | CRM and strategy: explain CRM is a key factor in a strategy for generating successful customer relationship and focuses on increasing customer loyalty and interaction to establish long-term customer engagement.Facilitate **Class discussion.** | 9 | Contribute to **Class discussion.**What is your definition of the word: ‘strategy’? |  |
|  | CRM and technology | CRM as a technology enabler: explain CRM is often associated with technology. Up to 47% of CRM technology solutions fail. CRM software is an enabler of customer relationship management, it should not be the driver. Facilitate **Activity 4.** Debrief this taking feedback from each group. | 10 | **6USMR LO4 E4 Activity 4**: Activity in pairsResearch and critically assess the key reasons why CRM strategies fail. Provide an example of one organization where CRM failed and the lessons that can be learned from this. | **6USMR LO4 E4 Activity 4: Reasons for failure** |
|  | CRM process & capabilities | CRM process: explain Payne identifies five cross-functional processes in the development of CRM strategy: Strategy development process: Value creation, multi-channel integration, information management, performance assessment. See Study guide for more detail.CRM capabilities: explain there are three capabilities CRM offers: Customer interaction management, customer relationship upgrading and customer win‐back. Facilitate **Class discussion.** | 11-12 | Contribute to **Class discussion.*** What is an example of a customer interaction?
* In what ways is managing customer interaction an enabler of long-term relationship building?
* What is an example of a customer upgrading?
* How does both the customer and the organisation benefit from upgrading?
* What is an example of a customer win back?
* Why is it important to win back and retain customers?
 |  |
|  | Adding value | Customer value: explain the value the customer receives from the organisation is defined by the perceived benefits of the offer made to the customer. There are two aspects to customer value: desired value and perceived value.Facilitate **Activity 5.** Debrief this taking feedback from each group.Ways to increase value: show the slide with examples of how to increase value to summarise the discussion. | 13-14 | **6USMR LO4 E4 Activity 5:** Activity in pairsChose an industry sector with which you are familiar. List ways in which an organisation in this sector can add value to its customers  | **6USMR LO4 E4 Activity 5: Customer value** |
|  | Customer journey | Touchpoints and customer journey mapping: explain a customer touchpoint is any influential action initiated by a communication, a human contact or a physical or sensory interaction. Businesses often map out the steps that different customers take in interacting with the organisation and where the touchpoints are.Facilitate **Activity 6.** Debrief this taking an example from each pair. | 15 | **A 6USMR LO4 E4 Activity 6**: Activity in pairsRead the blog: A step to step guide to building customer journey maps.<https://conversionxl.com/blog/customer-journey-maps/>Each person in the pair create a customer journey map for their interaction with the college/place of study today. Highlight the key touchpoints and indicate whether these were negative or positive experiences. Share the journey map with your partner. | **6USMR LO4 E4 Activity 6: Customer journey mapping** |
|  | Customer channels | Traditional and digital channels: explain the examples of traditional and digital communication channels.Facilitate **Class discussion.** | 16 | Contribute to **Class discussion.**What types of traditional channels can be used to communicate with customers?What types of digital channels can organisations use to communicate with customers? |  |
|  | Multi-channel | Multi-channel: explain the example on the slide of how someone uses multi-channels to communicate. Explain m[ulti-channel integration](https://www.emarsys.com/en/resources/blog/what-is-multichannel-marketing/) refers to the ability for customers to interact with an organisation via various platforms. Omni-channel: explain the increase of use of digital and social media a customer can now communicate with an organization via many connected channels. This is called omni-channels.Facilitate **Activity 7.** Debrief this asking for feedback from each small group. | 17-18 | **6USMR LO4 E4 Activity 7:** Small group activity.Read the article about CX (customer experience) and omni-channels<https://go.medallia.com/rs/669-VLQ-276/images/Medallia-Harness-Digital-Insights-to-Grow-Your-Entire-Enterprise.pdf>Critically assess the implications for organisations and marketers of the growth of customer communication via omni-channels. | **6USMR LO4 E4 Activity 7: Omni-channel** |
|  | Types of CRM | Three types of CRM: explain there are three types of CRM: operational, analytical and collaborative. | 19 | Contribute to **Class discussion.**What activities do you think fall under each type of CRM? |  |
|  | Performance assessment | Performance assessment: explain there are no universal measures of success of CRM.Facilitate **Activity 8.** Debrief this asking for feedback from each small group. | 20 | **6USMR LO4 E4 Activity 8: Group activity**Imagine you are the Marketing Manager for a chain of cinemas. You have adopted a multi-channel communication strategy and have invested in CRM technology that is analytical, operational and collaborative. Brainstorm a list of measures that you can use to assess the effectiveness of a CRM programme. | **6USMR LO4 E4 Activity 8: Performance assessment** |
|  | Homework | Brief on **Homework activity 9.** |  | Listen and ask questions as necessaryActivity in pairs as homework **6USMR LO4 E4 Activity 9:** Homework in pairs.Given the increasing use of omni-channel marketing, research, identify and critically assess future trends in CRM. What are the implications for marketers? Prepare a presentation about your conclusions. | **6USMR LO4 E4 Activity 9: Future trends in CRM** |
|  | Review of session and assessment criterion |  |  | Listen and ask questions as necessary. |  |

### SESSION 2: Relationship marketing planning and implementation issues in strategic relationship marketing

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Approx.****Duration** | **Topic** | **Tutor Activity** | **Slides** | **Learner Activity** | **Formative Assessment** |
| 6-7 hours | Introduction to session and assessment criterion | Assessment criterion 4.2Use **6USMR Tutor Presentation E4.pptx** | 21 | Listen and make notes. |  |
|  | Facilitate **Activity 9 feedback.** Ask each pair to present their conclusions.Given the increasing use of omni-channel marketing, research, identify and critically assess future trends in CRM. What are the implications for marketers? Prepare a presentation about your conclusions. |  | Contribute to discussion.Listen and make notes.  | **6USMR LO4 E4 Activity 9: Future trends in CRM** |
| Strategic relationship marketing process | Explain the process consists of planning, implementation and control.Facilitate **classroom discussion.** | 22 | Contribute to **classroom discussion.**What are the benefits of having a robust planning framework for strategic marketing? |  |
| Strategic planning frameworks | A strategic framework for customer relationship management: explain the four stages of the Payne and Frow framework: strategy process, value creation process, multi-channel integration process and performance assessment process. Refer to Study guide for more detail.SOSTAC ®: explain the framework: situation, objectives, strategy, tactics, actions, control.Facilitate **Activity 10.** Debrief this asking for feedback from each small group. | 23-24 | **6USMR LO4 E4 Activity 10**: Small group activityRefer to the Payne and Frow framework and the SOSTAC® framework, compare and contrast the two different planning frameworks. Identify when it may be appropriate to use each framework. | **6USMR LO4 E4 Activity 10: Compare and contrast the planning frameworks** |
| Issues in the implementation of CRM | Issues in the implementation of CRM: explain the key issues: Degree of organisational change, lack of leadership, lengthy time to implement, lack of resources, lack of strategic framework.Facilitate **Activity 11.** Debrief this asking for feedback from each small group. | 25 | **6USMR LO4 E4 Activity 11**: Small group activityAllocate one of the following issues to each small group:* Degree of organisational change
* Lack of leadership
* Lengthy time to implement
* Lack of resources
* Lack of strategic framework

For the issue the group has been allocated, identify how this issue impacts the successful implementation of CRM and strategies and tactics that can be adopted to overcome this. | **6USMR LO4 E4 Activity 11: Issue in the implementation of CRM** |
|  | Implementation and strategy development | Alignment: explain the need for an organisation’s vision, strategy, values and tactics to be aligned.Facilitate **Class discussion.** | 26  | Contribute to **Class discussion.**Why is it important that vision, values, strategy and tactics are aligned? What examples are there of organisations where there is lack of alignment? |  |
|  |  | RACI: explain for each activity in the implementation plan, it is helpful to consider RACI – who is responsible, accountable, needs to be consulted and informed.Facilitate **Class discussion.** | 27 | Contribute to **Class discussion.*** How does RACI help overcome issues of implementation?
* What is the impact of people engagement in CRM?
 |  |
|  | CRM implementation | Explain the steps in the implementation process: a) defining implementation needs and partners, b) supplier selection and evaluation, c) CRM implementation and d) training and support. Facilitate **Activity 12.** Debrief this asking for feedback from each small group. | 28 | **6USMR LO4 E4 Activity 12:** Group activityAllocate learners to one of four groups and ask them to list what considerations an organisation needs to give to each phase:a) Defining implementation needs and partnersb) Supplier selection and evaluationc) CRM implementationd) Training and support  | **6USMR LO4 E4 Activity 12: CRM implementation** |
|  | CRM systems and functions | Explain CRM systems have many different functions that all can be beneficial to businesses. Typically, CRM systems store all customer data in a single database, thus allowing one view of the customer.Facilitate **Activity 13.** Debrief this asking for feedback from each small group. | 29 | **6USMR LO4 E4 Activity 13:** Activity in pairsRead the report: <https://s3-eu-west-1.amazonaws.com/assets.henley.ac.uk/legacyUploads/3-1-Big-Data-Full-article.pdf>and the blog:<https://econsultancy.com/blog/66164-three-brand-case-studies-on-creating-a-single-customer-view/>List two benefits to the business of having one view of the customer and two benefits of being able to track and review customers’ history. Critically assess the role of big data in CRM. | **6USMR LO4 E4 Activity 13: CRM systems and functions** |
|  | Benefits of CRM systems | Explain the benefits including being able to manage the customer relationship, maximise the value of their existing customers and acquire new customers. Facilitate **Class discussion.** | 30 | Contribute to **Class discussion.**What are the benefits to the business of CRM systems? |  |
|  | Operational, analytical and collaborative CRM | Explain the three types of CRM.Facilitate **Class discussion.** | 31 | Contribute to **Class discussion**What are the interactions and dependencies of each of the three types of CRM?What are the benefits to the organisation and the customer of operational CRM? Of analytical CRM? And of collaborative CRM? |  |
|  | Types of data capture | Explain that there are four types of data that an organisation can capture: identity, descriptive, transactional, preference.Facilitate **Activity 14.** Debrief this asking for feedback from each pair. | 32 | **6USMR LO4 E4 Activity 14:** Activity in pairsThere are four types of data that an organisation can capture: identity, descriptive, transactional and preference data. Provide examples of the type of data that can be captured in each category.Critically evaluate how this data capture be used to enhance long-term customer relationships. | **6USMR LO4 E4 Activity 14: Data capture** |
|  | Business outcomes | Explain that the business outcomes of CRM can include revenue growth, improved quality of service, reduced operational costs, improved decision-making.  Facilitate **Activity 15.** Debrief this asking for feedback from each small group. | 33 | **6USMR LO4 E4 Activity 15:** Small group activityBrainstorm examples of business metrics that can be used to capture improvements in each of the following four categories: revenue growth, improved quality of service, reduced operational costs, improved decision making.   | **6USMR LO4 E4 Activity 15: Business outcomes** |
|  | Homework | Brief on Homework activity 16. |  | Listen and ask questions as necessary.Individual activity as homework. **6USMR LO4 E4 Activity 16:** Individual activityUndertake research to identify at least one example of a product or service that demonstrates the development and implementation of a successful relationship marketing strategy.Critically appraise the example you have chosen in terms of its relationship marketing strategy, value proposition, personalisation of interactions and the results it has achieved.Present your findings in a mini essay of c1000 words. | **6USMR LO4 E4 Activity 16: Mini essay: Relationship marketing** |
|  | Review of session and assessment criterion; review of learning outcome 4. Assignment preparation.  | Tutor to ensure that the class is fully briefed on assignment requirements.Organise revision sessions according to class needs.  |  | Listen and ask questions as appropriate. |  |