

The Implementation of Customer Relationship Management Technology in an Undergraduate Sales Class

Michael Smucker, University of Tampa

Abstract

The current Professional Selling in Sport (SPM 425) class at the University of Tampa has experiential projects with Tampa Bay area sport teams that are enhanced by providing in class customer relationship management (CRM) training and usage as part of this process. Most major professional sport teams in the Tampa Bay area utilize CRM software and consider it a valuable skill needed for entry level employees (R. Niemeyer & M. Sarage, personal communication, August 22, 2012). This paper will explain how CRM software enhances the sales learning process, provide information on making a CRM software purchase decision and how the University of Tampa integrates CRM into a semester based sales class. The hope is that other programs will utilize this information and adopt CRM into the curriculum.

Introduction

Ticket sales have been referred to as the lifeblood of sport that provides a foundation for the successful operation of sport teams and organizations (Irwin & Sutton, 2011). Kadlecak and Hampsten (2013) credit strong ticket sales with adding value to sponsorships, concession revenue, broadcast rights, and even the team's ability to sign free agents. In fact, the growth of attendance due to strong sales has resulted in the National Football League selling 98% of its available seating inventory (Blair, 2012). Even struggling sport organizations have realized the importance of ticket sales and have started expanding their sales and service staff to generate revenue (Kaplan, 2013). This emphasis on sales has trickled down to create a situation where a majority of the entry level jobs in the sport industry are in sales (McKelvey & Southall, 2008). Due to ticket sales being regarded as the most likely path into professional sport (Reese & Martin, 2013; Washo, 2004), one would assume sales education classes would be part of the required curriculum in sport management educational programs. This is not always the case as Eagleman and McNary (2010) found sport sales classes are required in less than one-fourth of sport management programs in the United States. Also, the Commission on Sport Management Accreditation (2010) does not include sales as required content to receive program accreditation. Even with these staggering facts, sport management scholars have called for more sales education in the sport management curriculum (Pierce, Petersen, Clavio, & Meadows, 2012).

The future appears to be bright regarding the disconnect between sales position demand and sport management sales training. Irwin and Sutton (2011) state the occurrence of sales coursework within sport management curriculum appears to be increasing. Also, several scholars have published sales educational models and texts in the hopes of increasing sales knowledge for educators and practitioners (e.g., Irwin, Southall, & Sutton, 2007; Irwin & Sutton, 2011; McKelvey & Southall, 2008; Reese, 2013). With the recent addition of sales content available for sport management faculty, an increase in the number of programs requiring a sales

course should follow. The gap between producing qualified sport sales students and placing those students in positions available in the industry can be reduced.

One potential problem with a career in sport sales is providing a realistic preview of what the nature of the job entails in an entry level position (Pierce et al., 2012). Traditional entry level positions such as inside sales involve challenges like meeting stressful deadlines, making hundreds of calls, and learning computer software programs. These careers also have positive aspects such as autonomy, enhanced relationships, and monetary incentives. One suggested method to provide students more of a real world preview is to include experiential learning projects as part of the sales class (Pierce & Petersen, 2010). An instructional method that is experiential in nature necessitates educators move from a teaching mentality to a learning mentality. Pierce and Petersen also suggest sport management educators have struggled to offer students client based experiential learning opportunities. One way to address the above concerns is to implement experiential sales projects into the sport management curriculum (Irwin et al., 2007). Experiential sales projects involve partnering with sport organizations to offer a collaborative active learning environment that engages students in the process of selling relevant inventory such as tickets. Engaged students enjoy learning more, recall more, and learn more than those who are not engaged (Slavich & Zimbardo, 2012). According to Won and Bravo (2009), sport management students prefer courses that integrate “real world” experiences with group collaborative work and individual based assignments. The idea is to increase student involvement in the sales class by fostering an environment where collaboration amongst classmates becomes necessary to share ideas, meet sales goals, and to creatively solve problems. All of this becomes possible due to the added value of working with a sport organization on a real world selling application.

Another often cited method to increase student engagement through experiential learning projects is to incorporate technology as part of the project (Anderson et al., 2005; Mallin, Jones, & Cordell, 2010). Some leading universities integrate sales technology instruction as part of their sales curriculum (Mallin, Jones, & Cordell, 2010; Pullins & Buehrer, 2008). Specifically, the use of customer relationship management (CRM) technology has been used to further engage and train the next generation of sales professionals as part of these real world experiences. With customer relationship management serving as a foundation to effective marketing and sales strategy, Mallin et al. (2010) state “at least a baseline knowledge of SFA [Salesforce Automation] - its purpose, benefits, and applications - should be taught in the basic marketing and/or sales curriculum” (p.221).

If ticket sales are the life-blood of revenue generation for sport organizations, CRM software is the performance enhancement needed to amplify selling opportunities. CRM software stems from the customer relationship management philosophy that the customer is the focus of the organization and that all management decisions revolve around the customer (Irwin et al., 2007). According to the data analyst with the Milwaukee Brewers, the basic reason for CRM use is to get a 360 degree view of the customer (Morgan, 2013). When teams and sport organizations have an accurate database they hope to predict better sales, retention, and service issues through forecasting. More specifically, CRM software helps organize and manage customer relationships from forecasting and prospecting, all the way to the closing and follow-up customer service stage of selling. It also allows the sharing and integration of information to sales teams and other parts of the organization to enhance servicing the client before, during, and after the sale.

Washo (2013) states that database management through CRM is a critical function of a team: Teams are trying to build better databases that allow them to offer more targeted ticket sales messages, and to build better communication paths for their ticket holders. Teams have created many subsets of their database with which to communicate. This includes season ticket holder e-newsletters, premium ticket holder newsletters, emails from sales group leaders, and ways for fans to connect such as kids' clubs, fan clubs, or coaches' clubs. (p. 73)

Using CRM software technology as part of real word experiential learning projects provides students the motivation to engage with the technology and enhances the effectiveness of the learning environment (Mallin et al., 2010). Therefore, the purpose of this paper is to guide and inform sport management faculty and sport sales classes on the process of implementing CRM technology into a sales experiential learning project. A review of the relevant theory and literature will be followed by a step by step process for CRM selection and a basic framework for implementing CRM into a semester based sales class.

This blueprint is based upon what is currently being implemented by an undergraduate sales class at the University of Tampa (SPM 425). The class has experiential projects with Tampa Bay area sport teams that are enhanced by providing in-class CRM training and usage as part of the sales training process. Major professional sport teams in the Tampa Bay area utilize CRM software and consider it a valuable skill needed for entry level employees (R. Niemeyer & M. Sarage, personal communication, August 22, 2012). This paper not only explains how CRM technology enhances the sales learning process and how the class integrates CRM into a semester based sales class, it will provide information on CRM software choice and cost in the hope that other programs will adopt CRM into the sales curriculum.

Experiential Learning Theory

One of the most commonly used contemporary teaching methods is experiential learning (Slavich & Zimbardo, 2012). Experiential Learning Theory proposes that learning is “the process whereby knowledge is created through the transformation of experience. Knowledge results from the combination of grasping and transforming experience” (Kolb, 1984, p.41). The theory is composed of two dialectically related modes of grasping experience and two dialectically related modes of transforming experience (Kolb & Kolb, 2005). The grasping experience modes are Concrete Experience (CE) and Abstract Conceptualization (AC), while the transforming experience modes are Reflective Observation (RO) and Active Experimentation (AE). Concrete immediate experiences produce observations and reflection by the learner. The reflections then become absorbed into abstract concepts that are used in creating new proposals for action. The proposals eventually are tested by the learner thus leading to create new experiences (Kolb & Kolb, 2005). This process is based on a learning situation where experiencing, reflecting, thinking, and acting are at the core of the theory. Experiential learning enhances students' self directed learning skills by boosting their capability to acquire, synthesize, analyze, and use knowledge in impactful ways (Slavich & Zimbardo, 2012). Also, the experiential learning cycle models the process of brain functioning of the sensory cortex (experience), integrative cortex (reflection), frontal integrative cortex (abstract concepts), and motor brain (active testing) (Zull, 2002).

Technology-Mediated Learning

At the heart of experiential learning is the notion students “learn by doing.” This theme is also a unifying concept in contemporary teaching methods stemming from the information systems literature. One such theory that connects active learning with technology is technology-mediated learning (Alavi & Leidner, 2001). This can be defined as an environment where student learner interactions with instructors, peers, or educational materials are facilitated through advanced information technologies. Oliver and Herrington (2003) draw the link between experiential learning and technology-mediated learning by suggesting that technology should not focus solely on teaching tasks, procedures, and concepts, but provide support and guidance on applying the material to real world scenarios.

Effective technology-mediated learning has been applied to sales instruction of CRM tools (Bonk, 2003; Mallin et al., 2010). Initial instruction focused on system features and technical properties such as teaching students how to create and edit customer contacts, or how to run detailed sales reports. According to Mallin et al., this is denoted a task based approach due to focus being on more mechanical facets needed to learn CRM. These skills are important to students learning salesforce automation technology such as CRM but fall short of adequately explaining its purpose, benefits, and applications. According to Oliver and Herrington (2003), a better instructional approach would be to include a work scenario as part of the explanation of specific tasks required to complete the activity. This scenario could be a real world experiential learning type of project with an outside organization or a created realistic scenario. According to Mallin et al., this is referred to as a scenario-based approach that allows the learner to gain a better grasp of stakeholders impacted, actions needed to solve problems, and why those actions are important. The researchers also determined that a scenario based approach using realistic sales circumstances significantly increased the perceived usefulness on students’ intent to use the CRM technology as opposed to utilizing a task based approach. The students’ perceived usefulness of the CRM technology was enhanced when using a scenario based approach as compared to a task-based approach (Mallin et al., 2010).

Experiential Learning in Sport Sales

One of the most widely cited sport management sales-oriented course templates was developed by Iwin et al. (2007). The pentagon of sport sales training (PSST) was developed for faculty interested in integrating a sport sales course within their curriculum. The PSST is composed of five distinct learning modules and has theoretical underpinnings based in part on Southall, Nagel, LeGrande, and Han’s (2003) Metadiscrete Experiential Learning Model. The first module is philosophy. Allowing students the opportunity to review existing sales philosophical models promotes the development of “new” thoughts regarding sales. This could lead to students creating their own sales philosophies or borrowing from those reviewed in the module (Iwin et al., 2007). Several sales and sport sales specific books, texts, and literature now exists that can be incorporated into sport experiential sales training programs. Also part of the philosophy module is the students’ interaction and learning due to the sales culture that is created as part of the project. This occurs through the selling environment (e.g., sales manager, peer group, technology, sales-room), internal and external situational factors (e.g., client sales philosophy, product life cycle, win-loss record, ticket plans available), and environmental factors such as leadership, venue, and laws (Iwin et al., 2007).

The second PSST module is product (Iwin et al., 2007). Providing product information to students gives them a chance to effectively sell potential customers. Specifically this module

focuses on the availability and interaction with the sport organization where students review training manuals, have site visits, and take product knowledge assessments (Irwin et al., 2007). Prospecting is the third module and is designed for student knowledge of the sport organization's prospective and existing customers. Irwin et al. state students should be provided prospect information that is more warm as opposed to cold. Essentially students' confidence levels are increased if given warm leads such as renewals or names from sales promotional campaigns. Another element to the prospecting module includes training on the team's database customer relationship management system (Irwin et al., 2007). This should allow students to investigate usage trends and view relevant comments. Module number four of the PSST is practice using script development and rehearsal, role play, and mock call execution (Irwin et al., 2007). Student self-confidence is built during this module through repetition and trial and error. Success in the practice module is dependent upon information collected in the previous stage. Once students demonstrate competence in the previous modules they move into the final module of the PSST, performance (Irwin et al., 2007). This is where authentic experiential learning and assessment takes place through actually selling sport inventory and gaining valuable feedback through results. Goals are set, weekly sales meeting take place, data is recorded, and performance is evaluated during this final stage to the PSST.

Other scholars have used the PSST as a template to integrating experiential learning in the sport management curriculum. McKelvey and Southall (2008) extended the ticket sales focus of the PSST to a class focusing on sponsorship sales. Also, Pierce and Petersen (2010) investigated the change in student perceptions of sport sales experiences after completing experiential projects in minor league baseball and hockey. Results indicated that students' expectation that a career in sales would be fun, rewarding, and challenging decreased after completion of the course. The scholars explained this finding as a result of typical decreased expectations resulting from realistic job previews that occur in all fields. The experiential learning project resulted in a real-world preview of what an entry level position in sales would look like. Thus, potential employees who experience reality are more likely to experience increased job satisfaction, commitment, and decreased turnover when hired as opposed to those who are not exposed to these experiences. Pierce and Petersen also found that the students completing the course reported no increase in sales skills level. They attribute this to the possibility of students overestimating their skills in sales prior to completing the class.

Steps to Implementing CRM Software into a Sales Class

Step 1 - Don't reinvent the wheel

As described above, the basic framework for teaching an experiential sales course in sport management has been set by Irwin et al. (2007) and has been used successfully by other educators in similar experiences (McKelvey & Southall, 2008). Therefore, the current undergraduate sales course at the University of Tampa is based on the pentagon of sport sales training (Irwin et al., 2007) and technology-mediated learning (Alavi & Leidner, 2001). Specifically the course is a 15 week experience consisting of one and sometimes two experiential projects with multiple professional sport organizations in the Tampa Bay area. The projects vary depending on sport organization need and have included selling group based experiences, individual tickets, and hospitality. The class is required for all sport management majors. Although this has created some difficulties managing and positively influencing the sales culture due to lack of student motivation and fear of sales, the result has been worth the extra effort of teaching additional students. Also, according to Pink (2012), this aligns with the concept of non-sales selling. Essentially Pink believes that anyone who engages in the act of

persuading, influencing, and convincing others is someone who indirectly sells. The following quote helps explain why the class is required:

One day the world began to change. More of us started working for ourselves- and because we were entrepreneurs, suddenly we became salespeople too. At the same time, large operations discovered that segmenting job functions didn't work very well during volatile business conditions- and because of that, they began demanding elastic skills that stretched across boundaries and included a sales component. (p. 26)

By requiring sales and teaching CRM software to every sport management major, we hope to increase employability of graduates.

The use of CRM software through technology-mediated learning fits into the foundation of the pentagon of sport sales training (Irwin et al., 2007) in several ways. First, the selling environment is enhanced and expanded due to the online accessibility of CRM. Students have the ability to integrate the use of CRM into their selling experiences on their own terms, when the need arises. For instance, if the student wishes to call prospects at home on the weekend, they have the capability to access, review, and enter information instantaneous to the experience. Essentially the traditional sales room as mentioned in the PSST is expanded to create more of a real-world atmosphere.

The second way CRM software fits into the foundation of PSST is the process of generating product knowledge, the third module of the PSST. The CRM system serves as the database that must be used and continually updated. Information is crucial to the sales process and building an accurate continuously updated database is vital for the current class and the continuity of future classes (McKelvey & Southall, 2008). An example of this for one of the sales experiential learning projects is the themed University of Tampa group night with the Tampa Bay Lightning. Students work with Lightning staff and are required to prospect during this event. This captured information can then be entered into the CRM database eventually leading to the performance stage of PSST. During this stage, the contacts in the CRM database are sold Lightning tickets to another event. In summary, the use of departmentally controlled CRM technology in the sales project fits perfectly into the Pentagon of Sport Sales Training (Irwin et al., 2007) and does not require major modifications to an existing sales class.

Step 2 - Utilize contacts in the field

Once a decision is made to implement departmental or university controlled CRM technology using PSST as the framework for the class, it is imperative to schedule a meeting with local sport teams or organizations that use CRM. I was able to meet with three professional sport teams the sales class has experiential projects with to discuss the advantages and disadvantages of their CRM system. This process can take several weeks depending on scheduling ease and should begin at least three months prior to the start of the semester when CRM will first be implemented. If possible try to meet with the database coordinator and one of the sales staff members. The database coordinator can speak to the macro capabilities from an administrator perspective and the sales staffer can provide perspective on user ease and functionality.

Because the instructor of the class will act as the sales manager they must also have user expertise before teaching the class. Therefore, they must be careful to collect accurate

information on simplicity of use from salespeople who interact with the technology on a daily basis. Conversely, as database coordinator, the class instructor will need to understand several administrative functions. These can include how to enroll and delete users (students), how to set security roles for students, and what functions will be visible to students. Discussing the pros and cons with the database coordinator who uses the CRM system every day at work is a great way to start the CRM review process. This information will help determine what CRM system to select and implement as part of the class.

During this process I was able to see screen shots, major functional areas (e.g., contacts, accounts, activities, opportunities), and search and communication capabilities of the CRM system to determine if they fit class needs. Features most important to the sales class were having online capability resulting in easy access during and outside of class, simplicity of use regarding entering and retrieving data, and communication features that allow users to connect and collaborate on sales opportunities, projects, and successes. Because the class closely works with these sport organizations in experiential learning projects the decision was made to use one of their CRM systems if favorably reviewed.

To corroborate the individual meeting with teams, information was also gleaned from a major sport consultant (Legends) who installs sport organization CRM systems. This served as a reassurance to the decision that was made. Salesforce and Microsoft Dynamics CRM were the CRM systems used by the teams and the two systems mentioned by Legends. In fact, Legends highly recommended Microsoft Dynamics CRM over Salesforce due to its frequency of use in the sport industry (J. Koettel, personal communication, August 27, 2013). Moving forward the focus for CRM systems was narrowed to two vendors: Salesforce and Microsoft Dynamics CRM. Both systems have positive aspects that meet the previously mentioned needs of students and faculty. Also, Salesforce is the number one CRM platform in the world (Salesforce, 2013) and Microsoft Dynamics brings expertise and the reputation of the worldwide leader in software (Microsoft, 2013).

Step 3 - Schedule a trial run

Typically, CRM systems have a 30 day trial available to potential customers. Once your search is narrowed to a few CRM choices, it's highly recommended starting the trial portion of the CRM search at least 60 days before the start of the semester. Learning the various software functions can be a time consuming and frustrating process that requires the use of video tutorials, customer service support as needed, and constant trial and error. Most faculty have not used CRM or have not kept up to date with the changes in technology and need time to navigate and learn how to fully utilize the CRM system. Faculty should practice the following functions as part of the 30 day trial experience: creating a lead and opportunity, qualifying the lead and navigating the sales process, creating a contact, creating an account, communicating through the internal CRM system (social media like function), creating activities such as an email, phone call, and task, and lastly changing the CRM system to fit your needs. The instructor can learn more about each of these functions by clicking on the available help items located internally on each CRM system. Also, many videos are available that provide a step by step description of the various functions. The videos can be found through the links provided by customer support or on YouTube.

For the SPM 425 Professional Selling in Sport class I was able to sign up for 30 day trails with Salesforce and MS Dynamics CRM. As part of this process I was immediately contacted by sales representatives from both organizations. This was another great way to further discuss the

benefits of each system and clarify your course technology needs (e.g., online access, number of users required, simplicity of use) with experts in the CRM technology. The fear of making an important decision and learning a new technology is reduced by talking through details of the software. Additionally, a very important aspect of the trial was my interaction with Zero2Ten a Microsoft Dynamics supplier and consultant. Zero2Ten contacted me throughout the Microsoft Dynamics trial process to further clarify my needs and to answer additional questions. I was able to enroll in a free one hour webinar designed to show new users various functions and layout of MS Dynamics CRM. This interaction also provided links to many “how to” videos on MS Dynamics CRM that were very helpful. Overall, the process of comparing two very similar CRM systems was streamlined with the 30 day trial process and resulted in more confidence and some expertise in the software.

Step 4 - Determine price and licensing process

One of the most important elements of the purchase making decision process was determining price and appropriate discounts. While discussing system benefits during the 30 day trial I was informed of educational programs for both Salesforce and Microsoft Dynamics. Salesforce offers their Foundation that is designed for nonprofit organizations and can be used by educational institutions. Salesforce offers the use of 10 free users throughout the year combined with a 70 to 80 percent discount per-user for those using over 10 (R. Patterson, personal communication, October 22, 2013). Most CRM software is priced on a per-user and per-month basis. In essence, if educational institutions pay for the CRM software, they pay each month regardless if students are in class or on summer or winter break.

Microsoft Dynamics has an Academic Alliance (DynAA) that consists of faculty from member educational institutions that use software from the Dynamics platform including CRM. Similar to the Salesforce Foundation, DynAA has a distinct website with customer and product support. However, DynAA contains more faculty specific support including the DynAA Faculty Connection offering a curriculum repository and access to academic papers, presentations and webinars (Retik, 2012). The site also has community forums to discuss faculty specific issues with 150,000 registered users (Retik, 2012). Regarding price, DynAA offers 25 free users throughout the year with the opportunity to register for more instances of 25 users as needed (L. Creamer, personal communication, October 16, 2013). This feature was extremely important considering I teach two sections of the SPM 425 class during the spring semester and needed up to 45 users.

The next step in the decision making process is to consult your university information technology (IT) department of your plans to use CRM technology in the classroom. Most large universities will have business programs or IT programs that currently utilize some aspect of CRM in an information systems type of course. Check to avoid duplication of technology within your university. The IT department will inform you if any department and faculty members use CRM technology due to the licensing requirements necessary. There were no classes that used CRM at the University of Tampa.

When a decision is made to implement any technology including CRM, several licensing agreements and forms must be completed between the institution and the CRM software organization. For instance, Microsoft required that a software request form and an educational software agreement be completed. The completion of these forms are typically spearheaded by the instructor teaching the class with the assistance of the IT department. Usually, the IT department is ultimately responsible for the planning, organization, and implementation of all

technology on campus even if using an online application and therefore should be kept in the communication loop. Because of this I also needed to complete an internal IT change management form.

The entire licensing internal and external process was more time consuming than originally planned and took two weeks to gather signatures from Deans and Department heads. Also, one additional week was needed after submitting the paperwork to the CRM organization resulting in a total of three weeks needed to navigate the completion of licensing agreements. More time than three weeks might be needed depending on size of institution and internal efficiencies regarding communication and work flow.

Step 5 - Make the decision

Ultimately I chose to move forward with the 2013 edition of Microsoft Dynamics CRM Online as opposed to Salesforce CRM. Both systems had nearly identical features (sales process, contacts, accounts, tasks) and simplicity of use for both faculty and students. However, Microsoft Dynamics CRM was free for an unlimited number of users, had more specific faculty access and support, and was highly recommended by a sport industry consultant and class experiential education partners. The link to Microsoft Dynamics CRM is <http://www.microsoft.com/en-us/dynamics/crm.aspx>. This link provides the necessary information to learn about CRM, get started with a guided tour and watch demonstration videos. For faculty wanting to move forward with the acquisition of free software and receive additional support the link to Microsoft Dynamics Academic Alliance is <http://www.microsoft.com/education/ww/leadership/Pages/dynamics-academic-alliance.aspx>.

Step 6 - Plan and implement the teaching mechanics of CRM

Although the purpose of this manuscript is to provide information regarding a pathway to purchase CRM technology, a basic framework of how to implement its use in a semester class must be provided. Before any teaching occurs the course instructor must add each student as a user and designate that student with a security role. The instructor is considered the administrator of the group and has editing capabilities throughout the entire system. Microsoft Dynamics CRM Online 2013 contains several options as potential security roles. Because the class is a standard sales class, each student in the class was given the “salesperson” security role. This allows each student to read and have access to all information within the CRM system but does not allow editing of any information they did not create.

Once users are enrolled and security roles provided, the CRM software is ready to be customized. For the SPM 425 class I chose to not customize any features. Essentially I wanted each student to have the capability to explore the other facets of the software that come standard to the system (marketing and customer service features). When students experiment with the customer service or marketing portal it adds to the synthesis of information and understanding of how marketing and service fit into the other facets. This allows the students to see the 360 degree big picture aspect that CRM provides users.

Task based approach The most efficient way to teach CRM is utilizing Mallin et al., (2010) approach of technology-mediated learning (Alavi & Leidner, 2001) applied to the pentagon of sport sales training (Irwin et al., 2007). Because part of the philosophy stage of the PSST involves guided learning from various sources, the introduction of the CRM software occurs early in the class and during this stage. Regarding the actual teaching of the CRM

system in class, Mallin et al., state a task based approach can be used. This focuses on teaching the features and technical elements of the CRM system. A step by step “how to” process should be completed in class using a lecture format combined with designated student work time. Also, students should be given separate take home assignments that correspond to the weekly topic. Specifically, the first five weeks of class should concentrate on teaching the following tasks in order: (week one) user registration, video tutorials, user navigation; (week two) create and edit contacts and customers, communication; (week three and four) navigating the sales process including opportunities and lead creation; (week five) creating and managing activities including tasks, phone calls, emails, and appointments. By designating the first five weeks of class to task elements of CRM, student expertise is developed that is needed in the next stages of PSST. All of this material is in addition to the normal PSST material covered in the sales class. Because of the additional amount of information being learned by the students I have chosen to expand the class from three to four credit hours. Simply completing the task elements mentioned above can take up to one hour each class period.

Scenario based approach After the completion of the philosophy stage of PSST (including the CRM task elements), the class develops product knowledge and then moves to the prospecting stage. Product knowledge is generated by methods recommended by the PSST but have no CRM relevance and will not be discussed. However, the prospecting stage does have CRM implications and begins what Mallin et al. (2010) refer to as a scenario based approach for CRM learning. In order to completely integrate CRM into a sales class, students need to learn more than task based functions. These task functions are necessary to operate CRM software but do not provide a deeper understanding of the context in which CRM typically operates. By integrating the use of CRM into the experiential learning sales project during the prospecting stage students can begin to understand the importance of CRM to successful selling.

For the SPM 425 class, students build upon their task skills and start to create actual leads and opportunities from prospecting that occurs during a Tampa Bay Lightning game. These captured prospects are then entered into the CRM system as a lead or opportunity and become assigned to a sales team. The lead or opportunity also is converted into a contact then assigned to an appropriate account sometimes called a company. All of these functions essentially mimic the real world selling environment and meet the definition of a scenario based CRM selling approach (Mallin et al, 2010.). The actual prospecting and corresponding CRM data entry occurs during the sixth and seventh week of class when the experiential learning project is selling Tampa Bay Lightning tickets.

One advantage of the sport management department and class controlling the CRM system is the ability to build a database for selling university related group nights as part of the experiential learning process. Adding the new data collected from prospecting to an already built database adds to the student understanding of the importance of managing and building a database from year to year. It also allows students to engage in the next stage of PSST, practice (Irwin et al., 2007). From a CRM standpoint, students can practice exploring and segmenting the database. This ability to manipulate the database builds confidence along with the traditional elements mentioned in the PSST (script development and rehearsal, role play, mock calling) as students move into the performance stage.

During the performance stage of the PSST students utilize the data from the CRM database to engage in the actual selling of the tickets. Leads are converted to opportunities while opportunities are converted to sales. All of this is a process that is enhanced by the use of the

CRM software and ensures student understanding of the sales process. As students progress through each step of the sales process the CRM database is continually updated. A great feature of the CRM system is instructor access to all of the continually updated student or user work. In-class sales meetings can occur where the class instructor can review each student's work. By simply clicking on the student user in the CRM system the instructor can see what leads have been converted to opportunities and what opportunities have been successfully closed. Also, the instructor can view the detail and depth of the information entered into the system. This includes not only the actual factual information necessary, but the use of activity items such as emails sent, calls made, notes, and tasks scheduled for each contact. Feedback and necessary motivation from the instructor can be instant due to the online nature of the CRM system.

Before the implementation of department or university controlled CRM into the sales class, weekly sales reports were needed from the students to update me on student progress. The CRM system replaces this with a more convenient and real time presentation of student work. Also, students are communicating internally using the CRM communication function which allows students to celebrate successes or ask questions to other students. The actual learning environment is enhanced through more modes of communication and collaboration due to the convenience factor of online CRM technology. Students can continue to learn outside of the classroom with the implementation of this technology.

The enhanced understanding of all class concepts including the use of CRM will become evident as the sales process advances during the remaining few weeks of the project. One way for students to connect the concepts of the class is to require a final project. Instead of collecting an all-encompassing sales portfolio as the end of semester requirement, I have compressed the portfolio to not include details that can be found in the CRM system. Only a summary of the CRM based information is required along with a description of goals, strategy, and self-reflection of the learning process.

Step 7 – Plan for next semester

Upon completion of an experiential class project utilizing CRM technology, there are a few items to consider. First, all information that has been entered into the database will be available for the instructor to use in next semester's class. Any unwanted data can be deleted. Second, all users (students) from the semester should be deleted. By deleting users the CRM system automatically increases the number of users available to be added for next semester. Third, the software will occasionally be updated. Therefore, be on the lookout for updates that might change the look and use of the CRM technology. The difference between the 2011 version of Microsoft Dynamics CRM Online and the 2013 version is evident. It is recommended that time be set aside to learn the new software when an update occurs.

Summary

The intent of this manuscript is to provide a roadmap for CRM implementation in the hopes that faculty will add CRM into the curriculum. Faculty can learn from the process I used and even further enhance the practice of teaching CRM as part of a sales project. Perhaps even the fear factor of technology and change can be minimized.

The process of implementing new technology into any class can be complex. However, when implementing the technology into a class that already contains an experiential learning element,

the task becomes intimidating. Having dealt with these reservations while implementing CRM software into my Professional Selling in Sport class, I recommend the advice of Paul Klein a group sales account executive with the Washington National. Regarding the learning of CRM Paul states, “it took a little while to learn” but you “must go in there and use it” you “must kick the tires” (personal communication, June 18, 2013). After completing the process of CRM implementation I agree with Paul’s assertion. The best way to start the process is to jump in and kick the tires. Good luck!

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