

## APPENDIX C: CLASS PROJECT

This appendix contains the class project for the Relationship Management course.

### Class Project

#### Introduction

The demo company, Cronus Inc., has invented a new bicycle called Millennium Bike.

In order to promote this new product, Cronus Inc. has decided to participate in a trade show, “Sport Futurus,” which is taking place in London. By attending the trade show, Cronus Inc. hopes to attract new leads that will increase Millennium Bike sales.

As part of the scenario, you will take on the roles of three different employees at Cronus Inc:

- Jane Sanders - marketing employee
- Mark Brown - salesperson
- Mary Lou - the sales and marketing manager

In completing this class project, you will be practicing the following:

- Setting up a campaign
- Profiling
- Segmenting
- Classification
- Opportunity management

### Setting Up a Campaign

#### Scenario 1:

As Jane Sanders, working in the marketing department, five weeks ago you set up the campaign for taking part in the trade show, and you assigned the appropriate to-dos. (Note: Some of the to-dos in this scenario have already taken place.)

## Tasks:

Set up the campaign using the following information:

Description: Millennium Bike Tradeshow Futurus  
Status Code: Started.  
Starting date: 5 weeks ago (from today's date)  
Ending date: four months later  
Salesperson: Empty

Assign the following to-dos that make up the campaign to the sales team, using any contact number and giving the to-dos the priority *normal*:

Type	Description	Date
blank	Send invitations to the trade show.	5 weeks ago
meeting	Talk to the trade show organizers.	4 weeks ago
blank	Make sure marketing material is available.	3 weeks ago
blank	Arrange staff for the booth.	2 weeks ago
blank	Attend the trade show.	2 days ago
blank	Register contacts from the trade show.	2 weeks after the trade show
blank	Send a thank-you letter to visitors at the show.	2 weeks after the trade show
phone call	Call the recipients of the letter.	4 weeks after the tradeshow

- Close the first four to-dos to show that these have already taken place.
- Enter a new salesperson: Mark Brown.
- Create a list of the following to-dos for Mark Brown:

Call the recipients of the letter.  
Presentation to the Sport & Leisure club.  
Invitation to Spain.

## Profiling

### Scenario 2:

You have returned from the tradeshow and now have some tasks to complete as a result.

### Tasks:

- Close the fifth to-do “Attending the tradeshow.”
- Set up a new job responsibility for the Procurement Manager.
- Use the information from the business cards that you received from the visitors at your stand to register the following contacts:

Company Name	Name	Address	Post code	City	Job Title
Eastern BIKE Power	John Wattson	2 Roehampton Lane	GB-NE21 3YG	Newcastle	Marketing Manager
National Racing Club	Stuart Morrisson	15 Capston Hall	GB-N12 5XY	London	Procurement Manager
Bikers Club	James Wondersom	13 Richmond Park	GB-WD6 9HY	Borehamwood	Sales Assistant
Bikers Move Ltd.	Eva Washington	8 Nottingham Lane	GB-SA3 7HI	Stratford	Procurement Manager
Runners Ltd.	Gordon Smith	25 Sea Lane	GB-PL14 5GB	Plymouth	Marketing Assistant
General Sports Equipment Inc.	Isabelle Smith	4 Old Farm Road	GB-EH16 8JS	Edinburgh	Procurement Manager

#### **NOTE:**

- *The e-mail address of Isabelle Smith is: [issm@tralala.co.uk](mailto:issm@tralala.co.uk)*
- *Assign these contacts to this mailing group: Futurus Sports.*
- *Add Cycling to the profile question regarding hobbies.*
- *Record the personal profiles for some of your new contacts.*

### Segmenting

#### Scenario 3:

You have decided to send the visitors at the trade show a thank-you letter.

#### Tasks:

- Create the thank-you letter (see the example at the end of this appendix).
- Create an interaction template and attach the letter. Remember to insert the following merge fields: Contact\_Mail\_Address, Document\_Date, Contact\_Salutation, Contact\_Name, SalespersonPurchaser\_Name, and SalespersonPurchaser\_Job\_Title.
- Create a segment made up of the visitors at the trade show. Remember to save the criteria.
- You realize that your segment does not include Lance Legstrong. Set him up as a contact, assign him to the mailing group you set up for the trade show visitors, and reuse the segment criteria to add him to your segment.
- Personalize the letter to Mr Legstrong by congratulating him on the merger.
- Ensure that Ms Smith receives her letters by e-mail.
- Log the segment, and create a follow-up segment.

### Opportunity Management

#### Scenario 4:

You are now Mark Brown, one of the sales representatives of Cronus Inc. You start your day by checking your to-do list.

#### Tasks:

- One of the first tasks is to call the recipients of the “Thank-you letter.” Use the wizard to make and log the phone calls.
- During his telephone conversation, Mr. Legstrong asks to be sent a quote for two Millennium bikes by fax. He seems to be very interested in buying the Millennium bike. Create this as an opportunity. The deal could be worth 8000 LCY, and you think there is an 80 percent chance of it succeeding.
- Record this interaction.

### Scenario 5:

You are now Mary Lou, the Sales and Marketing Manager of Cronus Inc. You have just come back from a management meeting where you have been asked to identify how much the company can expect to sell within the next few months. You were also asked to identify the most important customers of Cronus Inc. and invite them to an all-expenses-paid trip to Spain.

### Tasks:

- Use filters to view the opportunities for all the salespeople over the next months.
- Create a segment comprising of your top 10% of customers (according to how much they have bought from you), and refine it to include only those contacts working in the Procurement department.

### Example Thank-You Letter:

Dear

We would like to thank you for coming to see us at the Sport FUTURUS show, earlier this week. It was a pleasure to meet you. Once again, we have been delighted by the number of old friends and “new faces” to visit the stand. We hope you enjoyed your time with us, exploring our new production of the Millennium Bike.

I would very much welcome the opportunity to meet with you once again to discuss in more detail how the new production could become a part of your product portfolio or how we could assist you in marketing the new series of the Millennium Bike.

If you would like to phone our office on 234-432-432, I will be happy to arrange a time and place to suit you, or if you prefer to find out a little more about us first, please do not hesitate to visit our website, at [www.cronus-co.uk](http://www.cronus-co.uk).

We look forward to hearing from you in the near future.

Yours sincerely

