

**LESSON PLAN**  
**Richard Wheeler**  
**CUSTOMER RELATIONSHIP MANAGEMENT**  
**DBM2**  
**WEEK 1 – 4 SESSIONS**  
**FEB 28-4 MARCH**

<b>No</b>	<b>TOPIC</b>	<b>CONTENT/ACTION</b>	<b>COMPLETED</b>
<b>1</b>	<b>Resources</b>	Learners' Manual	
		White Board	
		Revision Questions	
<b>2</b>	<b>Learning Unit 1</b>	<b>Customer Relationship Defined</b>	
		P 19-P 32	
<b>3</b>	<b>Outcomes</b>	<ul style="list-style-type: none"> <li>• Defining the concept of a customer relationship</li> <li>• Evolution of “Customer Orientation” in marketing</li> <li>• Production concept</li> <li>• Selling concept</li> <li>• Marketing concept</li> </ul>	
	<b>Learning Unit 2</b>	<b>Customer Relationship Management</b>	
	<b>Outcomes</b>	<ul style="list-style-type: none"> <li>• Explain the cost of lost customers</li> <li>• Discuss the interdependency of and the differences between Relationship Marketing, Customer Relationship Management and Customer Management</li> <li>• Define and apply Customer Relationship Management</li> <li>• Discuss and apply customer retention strategies</li> <li>• Discuss how to follow-up service for customer retention</li> </ul>	
<b>4</b>	<b>Lecture Structure</b>	Student pre-knowledge determine	
		Overview of lesson	
		Main points listed on White Board	
		Apply to Industry	
		Questions and feedback	
<b>5</b>	<b>Evaluation</b>	Summarise lesson content	
		Students answer questions on question paper (revision questions provided)	
<b>6</b>	<b>Preparation for next lesson</b>	Students provided with the topics and pages to be dealt with in following class for home preparation	

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**WEEK 2 – 4 SESSIONS**  
**MARCH 7-11**

<b>No</b>	<b>TOPIC</b>	<b>CONTENT/ACTION</b>	<b>COMPLETED</b>
<b>1</b>	<b>Resources</b>	Learners' Manual	
		White Board	
		Revision Questions	
		P 34 - P 43	
<b>2</b>	<b>Learning Unit 2</b>	<b>Customer Relationship Management</b>	
	<b>Outcomes</b>	<ul style="list-style-type: none"> <li>• Explain the cost of lost customers</li> <li>• Discuss the interdependency of and the differences between Relationship Marketing, Customer Relationship Management and Customer Management</li> <li>• Define and apply Customer Relationship Management</li> <li>• Discuss and apply customer retention strategies</li> <li>• Discuss how to follow-up service for customer retention</li> </ul>	
<b>4</b>	<b>Lecture Structure</b>	Student pre-knowledge determine	
		Overview of lesson	
		Main points listed on White Board	
		Apply to Industry	
		Questions and feedback	
<b>5</b>	<b>Evaluation</b>	Summarise lesson content	
		Students answer questions on question paper (revision questions provided)	
<b>6</b>	<b>Preparation for next lesson</b>	Students provided with the topics and pages to be dealt with in following class for home preparation	

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**WEEK 3 – 4 SESSIONS**  
**MARCH 14-18**

<b>No</b>	<b>TOPIC</b>	<b>CONTENT/ACTION</b>	<b>COMPLETED</b>
<b>1</b>	<b>Resources</b>	Learners' Manual	
		White Board	
		Revision Questions	
		P 44 - P 56	
<b>2</b>	<b>Learning Unit 3</b>	<b>Quality Management</b>	
<b>3</b>	<b>Outcomes</b>	<ul style="list-style-type: none"> <li>• Identify the role of quality management in the business environment as part of the management role</li> <li>• Define the concept of quality</li> <li>• Explain the management of quality in the business environment as a management responsibility and management tool</li> </ul>	
<b>4</b>	<b>Lecture Structure</b>	Student pre-knowledge determine	
		Overview of lesson	
		Main points listed on White Board	
		Apply to Industry	
		Questions and feedback	
<b>5</b>	<b>Evaluation</b>	Summarise lesson content	
		Students answer questions on question paper (revision questions provided)	
<b>6</b>	<b>Preparation for next lesson</b>	Students provided with the topics and pages to be dealt with in following class for home preparation	

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**WEEK 4 – 4 SESSIONS**

**MARCH 22-25**

<b>No</b>	<b>TOPIC</b>	<b>CONTENT/ACTION</b>	<b>COMPLETED</b>
<b>1</b>	<b>Resources</b>	Learners' Manual	
		White Board	
		Revision Questions	
		<b>REVISION FOR TEST 1</b>	
		P 57 - P 71	
<b>2</b>	<b>Learning Unit 4</b>	<b>Relationship Marketing</b>	
<b>3</b>	<b>Outcomes</b>	<ul style="list-style-type: none"> <li>• Define Relationship Marketing</li> <li>• Outline the Relationship Marketing Process</li> <li>• Identify how the knowledge gained could be used to prepare a basic Relationship Marketing Mission and Vision for an organisation</li> </ul>	
<b>4</b>	<b>Lecture Structure</b>	Student pre-knowledge determine	
		Overview of lesson	
		Main points listed on White Board	
		Apply to Industry	
		Questions and feedback	
<b>5</b>	<b>Evaluation</b>	Summarise lesson content	
		Students answer questions on question paper (revision questions provided)	
<b>6</b>	<b>Preparation for next lesson</b>	Students provided with the topics and pages to be dealt with in following class for home preparation	

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**WEEK 5 – 4 SESSIONS**  
**4 APRIL– 8 APRIL**

<b>No</b>	<b>TOPIC</b>	<b>CONTENT/ACTION</b>	<b>COMPLETED</b>
<b>1</b>	<b>Resources</b>	Learners' Manual	
		White Board	
		Revision Questions	
		<b>SUBMIT ASSIGNMENT 1</b>	
		P 72– P 83	
<b>2</b>	<b>Learning Unit 6</b>	<b>Relationship Management</b>	
<b>3</b>	<b>Outcomes</b>	<ul style="list-style-type: none"> <li>• Explain the term “relationship” in the context of customer relationships</li> <li>• Identify the relationship between customer bonding and customer loyalty</li> <li>• Identify the shifts that have occurred in the concept of segmentation in order to accommodate relationship management</li> </ul>	
<b>4</b>	<b>Lecture Structure</b>	Student pre-knowledge determine	
		Overview of lesson	
		Main points listed on White Board	
		Apply to Industry	
		Questions and feedback	
<b>5</b>	<b>Evaluation</b>	Summarise lesson content	
		Students answer questions on question paper (revision questions provided)	
<b>6</b>	<b>Preparation for next lesson</b>	Students provided with the topics and pages to be dealt with in following class for home preparation	

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**WEEK 6 – 4 SESSIONS**  
**APRIL 11 – 15**

<b>No</b>	<b>TOPIC</b>	<b>CONTENT/ACTION</b>	<b>COMPLETED</b>
<b>1</b>	<b>Resources</b>	Learners' Manual	
		White Board	
		Revision Questions	
		P 84- P95	
<b>2</b>	<b>Learning Unit 7</b>	<b>Preparation for relationship selling</b>	
<b>3</b>	<b>Outcomes</b>	<ul style="list-style-type: none"> <li>• Identify the requirements for preparation of relationship-driven selling in the business environment</li> <li>• Explain the preparation of the business and marketing/sales environment for relationship selling in theory</li> </ul>	
<b>4</b>	<b>Lecture Structure</b>	Student pre-knowledge determine	
		Overview of lesson	
		Main points listed on White Board	
		Apply to Industry	
		Questions and feedback	
<b>5</b>	<b>Evaluation</b>	Summarise lesson content	
		Students answer questions on question paper (revision questions provided)	
<b>6</b>	<b>Preparation for next lesson</b>	Students provided with the topics and pages to be dealt with in following class for home preparation	

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**WEEK 7 – 4 SESSIONS**  
**APRIL 18-21**

<b>No</b>	<b>TOPIC</b>	<b>CONTENT/ACTION</b>	<b>COMPLETED</b>
<b>1</b>	<b>Resources</b>	Learners' Manual	
		White Board	
		Revision Questions	
		P 96- 112	
<b>2</b>	<b>Learning Unit 8</b>	<b>Customer satisfaction</b>	
<b>3</b>	<b>Outcomes</b>	<ul style="list-style-type: none"> <li>• Address customer satisfaction in the workplace environment</li> <li>• Will have the necessary skills and knowledge to handle customer complaints in a courteous and professional manner</li> <li>• Understand the correct way to handle complaints linked to products and or services</li> </ul>	
	<b>Learning Unit 9</b>	<b>Managing customer service</b>	
	<b>Outcomes</b>	<ul style="list-style-type: none"> <li>• Defining customer service</li> <li>• Understand the management of customer data in an effective manner to the benefit of CRM</li> <li>• Discuss the ways in which to improve customer service</li> </ul>	
<b>4</b>	<b>Lecture Structure</b>	Student pre-knowledge determine	
		Overview of lesson	
		Main points listed on White Board	
		Apply to Industry	
		Questions and feedback	
<b>5</b>	<b>Evaluation</b>	Summarise lesson content	
		Students answer questions on question paper (revision questions provided)	
<b>6</b>	<b>Preparation for next lesson</b>	Students provided with the topics and pages to be dealt with in following class for home preparation	

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**WEEK 8 – 4 SESSIONS**  
**MAY 2-6**

<b>No</b>	<b>TOPIC</b>	<b>CONTENT/ACTION</b>	<b>COMPLETED</b>
<b>1</b>	<b>Resources</b>	Learners' Manual	
		White Board	
		Revision Questions	
		P 113– P 129	
		<b>REVISION FOR TEST 2</b>	
<b>2</b>	<b>Learning Unit 10</b>	<b>Managing Customer conflict</b>	
<b>3</b>	<b>Outcomes</b>	<ul style="list-style-type: none"> <li>• Explain the basic skills to handle conflict resolution on a general level</li> <li>• Understand the principles of conflict management</li> </ul>	
	<b>Learning Unit 11</b>	<b>Maintaining customer relationships</b>	
	<b>Outcomes</b>	<ul style="list-style-type: none"> <li>• Utilise customer relationship maintenance principles in the working environment</li> <li>• Explain the principles of customer relationship maintenance</li> </ul>	
<b>4</b>	<b>Lecture Structure</b>	Student pre-knowledge determine	
		Overview of lesson	
		Main points listed on White Board	
		Apply to Industry	
		Questions and feedback	
		<b>Revision Test L/U 1-9</b>	
<b>5</b>	<b>Evaluation</b>	Summarise lesson content	
		Students answer questions on question paper (revision questions provided)	
<b>6</b>	<b>Preparation for next lesson</b>	Students provided with the topics and pages to be dealt with in following class for home preparation	



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**WEEK 9 – 4 SESSIONS**  
**MAY 16-20**

<b>No</b>	<b>TOPIC</b>	<b>CONTENT/ACTION</b>	<b>COMPLETED</b>
<b>1</b>	<b>Resources</b>	Learners' Manual	
		White Board	
		Revision Questions	
		P 130- 140	
		<b>SUBMIT ASSIGNMENT 2</b>	
<b>2</b>	<b>Learning Unit 12</b>	<b>Assessing the customer relations strategy</b>	
<b>3</b>	<b>Outcomes</b>	<ul style="list-style-type: none"> <li>• Assess CRM strategies in the working environment</li> <li>• Understand the assessment of a CRM strategy based on the best practices in this field</li> </ul>	
<b>4</b>	<b>Lecture Structure</b>	Student pre-knowledge determine	
		Overview of lesson	
		Main points listed on White Board	
		Apply to Industry	
		Questions and feedback	
<b>5</b>	<b>Evaluation</b>	Summarise lesson content	
		Students answer questions on question paper (revision questions provided)	
<b>6</b>	<b>Preparation for next lesson</b>	Students provided with the topics and pages to be dealt with in following class for home preparation	

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**WEEK 10 – 4 SESSIONS**  
**MAY 23-27**

<b>No</b>	<b>TOPIC</b>	<b>CONTENT/ACTION</b>	<b>COMPLETED</b>
<b>1</b>	<b>Resources</b>	Learners' Manual	
		White Board	
		Revision Questions	
		P141-154	
<b>2</b>	<b>Learning Unit 13</b>	<b>Social, Ethical and legal issues in doing business</b>	
<b>3</b>	<b>Outcomes</b>	<ul style="list-style-type: none"> <li>• Understand ethics in the business environment and should be able to assess behaviours in terms of good ethical conduct in the workplace and business environment</li> <li>• Discuss ethical issues linked to the area of selling</li> <li>• Define ethical dilemma</li> <li>• Define ethical behaviour</li> </ul>	
	<b>Learning Unit 14</b>	<b>Ethics in dealing with sales people</b>	
	<b>Outcomes</b>	<ul style="list-style-type: none"> <li>• Deal with a group of sales people in an ethical way</li> <li>• Explain the levels of sales pressure</li> <li>• Explain decisions affecting territory</li> </ul>	
<b>4</b>	<b>Lecture Structure</b>	Student pre-knowledge determine	
		Overview of lesson	
		Main points listed on White Board	
		Apply to Industry	
		Questions and feedback	
<b>5</b>	<b>Evaluation</b>	Summarise lesson content	
		Students answer questions on question paper (revision questions provided)	
<b>6</b>	<b>Preparation for next lesson</b>	Students provided with the topics and pages to be dealt with in following class for home preparation	

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**WEEK 11 – 4 SESSIONS**  
**MAY 30-JUNE 3**

<b>No</b>	<b>TOPIC</b>	<b>CONTENT/ACTION</b>	<b>COMPLETED</b>
<b>1</b>	<b>Resources</b>	Learners' Manual	
		White Board	
		Revision Questions	
		P 155 - 174	
<b>2</b>	<b>Learning Unit 15</b>	<b>Ethics in dealing with customers</b>	
<b>3</b>	<b>Outcomes</b>	<ul style="list-style-type: none"> <li>• Understand the importance of ethical behavior in dealing with customers</li> <li>• Implement the policies and practices associated with healthy ethical conduct in the workplace and business environment</li> </ul>	
	<b>Learning Unit 16</b>	<b>Managing sales ethics</b>	
	<b>Outcomes</b>	<ul style="list-style-type: none"> <li>• Establishing a code of ethics</li> <li>• Creating Ethical structures</li> </ul>	
	<b>Learning Unit 17</b>	<b>Establishing control systems</b>	
		<ul style="list-style-type: none"> <li>• Identify control measures to enhance ethics in the workplace environment</li> <li>• Identify the guidelines for managing ethics</li> <li>• Explain the benefits of managing ethics</li> </ul>	
<b>4</b>	<b>Lecture Structure</b>	Student pre-knowledge determine	
		Overview of lesson	
		Main points listed on White Board	
		Apply to Industry	
		Questions and feedback	
<b>5</b>	<b>Evaluation</b>	Summarise lesson content	
		Students answer questions on question paper (revision questions provided)	
<b>6</b>	<b>Preparation for next lesson</b>	Students provided with the topics and pages to be dealt with in following class for home preparation	

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**WEEK 12 – 4 SESSIONS**  
**JUNE 6-10**

<b>No</b>	<b>TOPIC</b>	<b>CONTENT/ACTION</b>	<b>COMPLETED</b>
<b>1</b>	<b>Resources</b>	Learners' Manual	
		White Board	
		Revision Questions	
<b>2</b>	<b>Learning Unit 1-17</b>	<b>REVISION FOR EXAMINATION</b>	
<b>3</b>	<b>Outcomes</b>		
<b>4</b>	<b>Lecture Structure</b>	Student pre-knowledge determine	
		Overview of lesson	
		Main points listed on White Board	
		Apply to Industry	
		Questions and feedback	
<b>5</b>	<b>Evaluation</b>	Summarise lesson content	
		Students answer questions on question paper (revision questions provided)	
<b>6</b>	<b>Preparation for next lesson</b>	Students provided with the topics and pages to be dealt with in following class for home preparation	