UTAH SYSTEM OF HIGHER EDUCATION

Utah System of Higher Education
CRM Administration
FY2027 / 20 Credits (600 Clock-Hours)

Foundational Courses

Foundational

TECU 1000 CRM Fundamentals **2 Credits / 60 Clock-Hours**

This course introduces the purpose, structure, and core functions of customer relationship management (CRM) systems. Students learn how organizations use CRM platforms to manage customer data, track interactions, and support operational workflows. Using Zoho CRM, students explore system components including modules, fields, records, and basic automations. Through guided configuration activities, students gain an understanding of how CRM systems help businesses organize information, support communication, and improve customer experience.

Objectives:
- Identify core CRM components including modules, fields, records, and workflows.
- Configure a basic Zoho CRM environment using structured data.
- Map customer lifecycle stages to CRM processes.
- Explain the role of CRM in supporting customer operations and business outcomes.
- Navigate and perform basic tasks within Zoho CRM.

TECU 1010 Needs Analysis and Design **2 Credits / 60 Clock-Hours**

Students develop skills for gathering business requirements and translating them into CRM system design plans. The course covers stakeholder interviews, needs assessments, customer journey mapping, and workflow diagramming. Students learn to document findings and create system design proposals that outline data structures, process flows, and dashboard layouts within Zoho CRM. Emphasis is placed on analytical thinking, clear communication of design decisions, and aligning system plans with defined business objectives.

Objectives:
- Conduct a stakeholder needs analysis and summarize findings.
- Map customer journeys and identify key interaction points.
- Create workflow diagrams representing CRM system logic.
- Draft a system design document outlining structure, requirements, and data models for Zoho CRM.
- Present a CRM design proposal to stakeholders.

TECU 1020 Beginning CRM Implementation **2 Credits / 60 Clock-Hours**

In this first implementation course, students apply their knowledge of CRM fundamentals, needs analysis, and system design to complete a guided project within Zoho CRM. Students conduct a needs analysis for a provided project scenario, develop a system design plan, and build functional system components including modules, fields, record layouts, basic workflow automations, and user roles. Students write user stories to guide configuration decisions and document their work throughout the process. This course establishes the foundational implementation cycle—from analysis through build—used in all subsequent implementation courses.

Objectives:
- Conduct a needs analysis for a provided project scenario.
- Develop a system design plan based on documented requirements.
- Configure modules, fields, and record layouts within Zoho CRM.
- Build basic workflow automations tied to business processes.
- Write user stories and document configuration decisions throughout the project.

TECU 1030 Client Interaction **2 Credits / 60 Clock-Hours**

This course develops the interpersonal and communication skills required when working with clients in CRM administration and operations roles. Students practice gathering requirements through structured interviews, presenting system proposals, delivering status updates, and managing client expectations. The course covers professional communication across channels including email, video conferencing, and in-person meetings. Students also explore strategies for handling feedback, managing scope changes, and building productive client relationships.

Objectives:
- Conduct structured client interviews to gather system requirements.
- Deliver professional status updates and system demonstrations.
- Communicate technical concepts to non-technical stakeholders.
- Apply strategies for managing client expectations and scope changes.
- Demonstrate professional etiquette across multiple communication channels.

TECU 1040 Intermediate CRM Implementation **3 Credits / 90 Clock-Hours**

Building on the skills from CRM Implementation 1, this course adds client interaction to the implementation cycle. Students receive a new project scenario and are responsible for conducting a needs analysis, developing a system design, and building a more complex Zoho CRM configuration that includes multi-step workflow automations, conditional logic, reporting dashboards, and integrated communication tools such as email templates and notification triggers. Students also practice presenting proposals, delivering status updates, and incorporating client feedback throughout the project. Emphasis is placed on managing the relationship between system configuration decisions and client expectations.

Objectives:
- Conduct a needs analysis and present a system design proposal incorporating client feedback.
- Configure multi-step workflow automations with conditional logic in Zoho CRM.
- Build dashboards and reports that support operational decision-making.
- Integrate email templates and notification automations into Zoho CRM workflows.
- Deliver professional status updates and incorporate client feedback into the implementation.

TECU 1050 Frameworks and Methodologies **1 Credit / 30 Clock-Hours**

This course introduces common project management and development frameworks used in CRM implementation environments. Students explore methodologies including Agile, Scrum, and Waterfall, and learn how these frameworks apply to CRM system planning, development, and deployment cycles. The course covers sprint planning, task tracking, documentation standards, and iterative development practices. Students apply framework concepts to prepare for collaborative implementation work in CRM Implementation 3.

Objectives:
- Identify key characteristics of Agile, Scrum, and Waterfall methodologies.
- Apply sprint planning and task-tracking practices to CRM projects.
- Structure implementation work using iterative development cycles.
- Maintain project documentation aligned with methodology standards.
- Evaluate which framework best supports a given CRM project scope.

TECU 1060 Group CRM Implementation **3 Credits / 90 Clock-Hours**

Building on the skills from CRM Implementations 1 and 2, this course adds collaborative development and project management methodologies to the implementation cycle. Students work in teams to identify their own business problem, define a project scope, and apply a chosen framework such as Agile or Scrum to manage their workflow. Teams conduct a needs analysis, develop a system design, coordinate with clients, and build a Zoho CRM solution that integrates tools from the Zoho ecosystem including Zoho Flow, Zoho Sign, and Zoho Bookings. Students define team roles, maintain shared documentation, manage version control, and prepare unified deliverables for stakeholder review. The course emphasizes collaborative problem-solving and the coordination skills expected in professional CRM environments.

Objectives:
- Apply a project management methodology to coordinate a team-based CRM implementation.
- Identify a business problem as a team and define a project scope.
- Conduct a needs analysis, system design, and client interaction process as a team.
- Integrate Zoho ecosystem tools including Zoho Flow, Zoho Sign, and Zoho Bookings into a CRM build.
- Present a completed team CRM solution to stakeholders.

TECU 1070 Career Preparation **1 Credit / 30 Clock-Hours**

This course prepares students for entry-level employment in CRM administration and related operational roles. Students develop résumés, portfolios, and professional communication materials that highlight their CRM skillsets. The course includes interview practice, workplace expectations, and strategies for professional networking within CRM and customer operations communities. Students explore career pathways and gain insight into standard workplace tools, responsibilities, and opportunities in CRM-related fields.

Objectives:
- Create a résumé tailored to CRM administration roles.
- Build a digital portfolio featuring completed CRM projects.
- Demonstrate professional interviewing techniques.
- Engage with industry contacts through structured networking activities.
- Identify CRM-related career pathways and required competencies.

TECU 1080 Advanced CRM Implementation **3 Credits / 90 Clock-Hours**

This capstone implementation course combines all knowledge and skills developed across the program. Unlike previous implementations, students are not given a project scenario—they independently identify a business problem, define their own project scope, conduct a needs analysis, design the system, manage client interactions, and apply an appropriate project management methodology. Students build an advanced implementation using any combination of Zoho products, extending beyond Zoho CRM to include tools such as Zoho Books, Zoho Desk, Zoho Projects, Zoho Analytics, Zoho Flow, Zoho Sign, Zoho Bookings, or other Zoho applications as needed. The final deliverable is a comprehensive, portfolio-ready build that demonstrates proficiency across the full implementation lifecycle.

Objectives:
- Independently identify a business problem and define a project scope.
- Conduct a complete implementation cycle including needs analysis, system design, client interaction, and methodology application.
- Build an advanced solution using multiple Zoho products beyond Zoho CRM.
- Produce comprehensive project documentation including proposals, architecture diagrams, and testing records.
- Deliver a portfolio-ready implementation that demonstrates mastery of CRM administration skills.

TECU 1090 CRM Exploration **1 Credit / 30 Clock-Hours**

This course challenges students to apply their CRM skills to a platform outside of Zoho. Students select one of four approved alternative platforms—HubSpot, Salesforce, Monday.com, or Microsoft Dynamics 365—and replicate their CRM Implementation 1 project within that new environment. Through this process, students compare platform capabilities, adapt their configuration approach to different system architectures, and develop the versatility expected of CRM professionals who work across multiple platforms. The course builds confidence in learning new tools independently and reinforces core CRM concepts through cross-platform application.

Objectives:
- Select and set up an approved alternative CRM platform (HubSpot, Salesforce, Monday.com, or Microsoft Dynamics 365).
- Replicate the CRM Implementation 1 project within the selected platform.
- Compare and contrast configuration approaches between Zoho CRM and the alternative platform.
- Adapt workflow and automation logic to a different system architecture.
- Document platform differences and present findings to peers.