# ITM90A/B z (CRM)

## Purpose of the Assignment

A good client relationship is key to a fruitful capstone project experience. In a broad sense, a client could be anyone including your boss, your customer, or colleagues in a business department. So it is important that you develop the ability to manage an involved, engaged and commitment client relationship. This assignment is designed to help you develop/enhance the ability.

## Content Requirement

In this reflection, you are required to analyze your group’s performance on how you have managed client management in each semester. The reflection should be written in an essay format including an introduction, a main body, and a conclusion. In particular, the following content should be included:

1. Communication Plan

Describe whether you have created within your group a communication plan guiding your group’s interaction with your client, and if so, the content of the communication plan.

If you haven’t developed a communication plan within your group, describe how your group has interacted with the client. For example, did a designated a group member as a main contact with the client? How often did you communicate with your client and for what purpose? What communication media (e.g., email, telephone) did you apply in the communication?

In describing how you have interacted with your client, you also need to indicate what your group has done to keep your client involved in, engaged to, and committed to the group project.

1. Assessment of the Client Management

Regardless how well you have planned, there are always challenges in working with a client. So you need to delineate challenge(s) you have faced in managing the relationship with the client, and how you have tried to overcome the challenge(s).

1. Action plan

Assess your level of satisfaction with the extent to which your group has managed client management. In particular, evaluate the degree to which the client is involved, engaged, and committed to the project. Use evidence to support your assessment.

Based on the assessment, create an action plan on how to improve the relationship with the client in the future. Be as specific as possible.

## Format and Submission Requirement

The reflection should be no more than five pages, and submitted in an MS Word document.

## Evaluation Rubric

The reflection will be evaluated based on four areas: Develop Communication Plan, Resolve Challenges, Identify Action Plan, and Communication. There are three categories to assess Communication including structure, expression, and mechanics. The detailed marking rubric for the reflection can be found in Table One.

**Table One Rubric for Client Relationship Management**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Trait** | **Does Not Meet Expectations (0-2.5)** | **Meets Expectations (2.5-3.75)** | **Exceeds Expectations (3.75-5)** | **Points** |
| Develop communication plan | Has not clearly described the process working with the client, and the communication plan is not clear | Has described a process working with the client in developing a communication plan, and offered some details of the plan | Has clearly described a process working with the client in developing a communication plan, and offered details of the plan (e.g., contact person, frequency of contact) | 5 |
| Resolve challenges | Fail to assess CRM result, and identify challenges with managing client relationship | Has assessed the client relationship management by using some evidence, identified some challenges with managing client relationship, and demonstrated how some of the challenges were addressed | Has clearly assessed how the group did in managing client relationship by providing evidence, identified challenges with managing client relationship, and clearly demonstrated how the challenges were addressed | 5 |
| Identify action plan | Fail to identify areas of improvement in managing client relationship. Provide no clear action plan or actions taken. | Has identified areas of improvement in managing client relationship. The action plan is clear. | Has clearly identified areas of improvement in managing client relationship. An action plan has to be clear and convincing. | 5 |
| Communication – Structure | Student’s writing tends to ramble and does not have a clear focus; main idea or argument are presented in a disorganized, unrelated way | Student’s writing demonstrates a logical development of ideas. | Student’s writing shows consistency and clear logic flow. Ideas expressed (e.g., lessons learned) are built on earlier discussion/analysis. | 5 |
| Communication - Expression | Topic or main ideas are poorly developed. | Topic or main ideas are expressed. | Topic or main ideas are well-developed and clearly expressed | 5 |
| Communication - Mechanics | Written work contains persistent and significant errors in word selection and use, sentence structure, spelling, punctuation, and capitalization | Written work is mostly free of spelling and grammatical errors; Presence of few errors is not distracting; Demonstrates some sentence variety | Written work contains no spelling or grammatical errors; excellent word choice; demonstrates both simple and complex sentence structure | 5 |
| **Total:** | | | | **30** |