



MONASH University
Information Technology

FIT5158
Customer relationship management and data mining

Unit Guide

Semester 1, 2012

The information contained in this unit guide is correct at time of publication. The University has the right to change any of the elements contained in this document at any time.

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Table of Contents

<u>FIT5158 Customer relationship management and data mining - Semester 1, 2012</u>	1
<u>Mode of Delivery</u>	1
<u>Contact Hours</u>	1
<u>Workload</u>	1
<u>Unit Relationships</u>	1
<u>Prerequisites</u>	1
<u>Chief Examiner</u>	1
<u>Campus Lecturer</u>	1
<u>Caulfield</u>	2
<u>Sunway</u>	2
<u>Tutors</u>	2
<u>Caulfield</u>	2
<u>Academic Overview</u>	3
<u>Outcomes</u>	3
<u>Graduate Attributes</u>	3
<u>Assessment Summary</u>	3
<u>Teaching Approach</u>	3
<u>Feedback</u>	4
<u>Our feedback to You</u>	4
<u>Your feedback to Us</u>	4
<u>Previous Student Evaluations of this unit</u>	4
<u>Required Resources</u>	4
<u>Unit Schedule</u>	5
<u>Assessment Requirements</u>	6
<u>Assessment Policy</u>	6
<u>Assessment Tasks</u>	6
<u>Participation</u>	6
<u>Examinations</u>	7
<u>Examination 1</u>	7
<u>Assignment submission</u>	7
<u>Online submission</u>	7
<u>Extensions and penalties</u>	7
<u>Returning assignments</u>	8
<u>Referencing requirements</u>	8
<u>Other Information</u>	9
<u>Policies</u>	9
<u>Student services</u>	9
<u>Other</u>	10

FIT5158 Customer relationship management and data mining - Semester 1, 2012

This unit provides an understanding of the business value of customer relationship management and how data mining technology can be used to improve organizational interaction with customers. Building a business around the customer relationship is the aspiration of many modern organizations. Customer relationship management and data mining has been combined together to provide the required concepts, techniques, technology and tools to achieve this goal. The unit discuss how IT and IT based techniques can be used for customer segmentation, clustering and classification, market basket analysis and association rule mining in addition to traditional CRM.

Mode of Delivery

- Caulfield (Day)
- Sunway (Day)

Contact Hours

2 hrs lectures/wk, 1 hr laboratory/wk

Workload

Students will be expected to spend a total of 12 hours per week during semester on this unit.

This will include:

- two-hour lecture and
- one-hour tutorial (or laboratory) (typically requiring advance preparation)
- a minimum of 3 hours of personal study per one hour of contact time in order to satisfy the reading and assignment expectations.

- You will need to allocate up to 5 hours per week in some weeks for use of a computer, including time for newsgroups/discussion groups.

Unit Relationships

Prerequisites

FIT9004 or FIT9017

Chief Examiner

Associate Professor David Dowe

Campus Lecturer

Caulfield

David Dowe

Consultation hours: To Be Discussed in Lectures and Confirmed

Sunway

Elsa Phung

Tutors

Caulfield

Minh Le Viet

Sumith Matharage

Academic Overview

Outcomes

At the completion of this unit students will be able to:

- use software tools and techniques for identifying business opportunities;
- plan direct marketing campaigns and product introductions;
- analyse and understand customer churn with data mining tools;
- create stable and accurate predictive models and interpret results;
- provide advise to management on CRM;
- advise management on data mining techniques and tools.

Graduate Attributes

Monash prepares its graduates to be:

1. responsible and effective global citizens who:
 - a. engage in an internationalised world
 - b. exhibit cross-cultural competence
 - c. demonstrate ethical values

critical and creative scholars who:

- a. produce innovative solutions to problems
- b. apply research skills to a range of challenges
- c. communicate perceptively and effectively

Assessment Summary

Examination (3 hours): 60%; In-semester assessment: 40%

Assessment Task	Value	Due Date
Assignment 1 - SQL Server and Data Warehousing	20%	Week 6, Thursday 5 April 2012
Assignment 2 - ``Data Mining''	20%	Week 11, Friday 18 May 2012
Examination 1	60%	To be advised

Teaching Approach

Lecture and tutorials or problem classes

This teaching and learning approach provides facilitated learning, practical exploration and peer learning.

Feedback

Our feedback to You

Types of feedback you can expect to receive in this unit are:

- Informal feedback on progress in labs/tutes
- Graded assignments without comments

Your feedback to Us

Monash is committed to excellence in education and regularly seeks feedback from students, employers and staff. One of the key formal ways students have to provide feedback is through SETU, Student Evaluation of Teacher and Unit. The University's student evaluation policy requires that every unit is evaluated each year. Students are strongly encouraged to complete the surveys. The feedback is anonymous and provides the Faculty with evidence of aspects that students are satisfied and areas for improvement.

For more information on Monash's educational strategy, and on student evaluations, see:
<http://www.monash.edu.au/about/monash-directions/directions.html>
<http://www.policy.monash.edu/policy-bank/academic/education/quality/student-evaluation-policy.html>

Previous Student Evaluations of this unit

More mathematical material - such as probability and even logarithms - will be introduced.

There might be more examples introduced in lectures, and the tutorials might be more practical.

If you wish to view how previous students rated this unit, please go to
<https://emuapps.monash.edu.au/unitevaluations/index.jsp>

Required Resources

Please check with your lecturer before purchasing any Required Resources. Prescribed texts are available for you to borrow in the library, and prescribed software is available in student labs.

WEKA Data Mining software
SQL Server (2008)

This and other any software needed - such as Minimum Message Length (MML) software for clustering and/or decision trees/graphs - will be made available or provided.

Students should also have at least some degree of mathematical literacy - including, e.g., notions of probability and logarithm.

Unit Schedule

Week	Activities	Assessment
0		No formal assessment or activities are undertaken in week 0
1	CRM and Customer Intelligence	No assessment, no tute/lab
2	Storing Data for Customer Intelligence	First tute/lab, no assessment
3	Data Warehousing with SQL Server 2005	
4	Dimensional Modelling	
5	Data Warehouse and Analytical CRM	
6	Online Analytical Processing	Assignment 1 due Week 6, Thursday 5 April 2012
7	Introduction to Business ``Data Mining''	
8	Customer Relationship Management (CRM)	
9	Decision Trees	
10	Neural Networks	
11	Collaborative Filtering and User Profiling	Assignment 2 due Week 11, Friday 18 May 2012
12	Customer Life Cycle and Data Mining	
	SWOT VAC	No formal assessment is undertaken SWOT VAC
	Examination period	LINK to Assessment Policy: http://policy.monash.edu.au/policy-bank/academic/education/assessment/assessment-in-coursework-policy.html

*Unit Schedule details will be maintained and communicated to you via your MUSO (Blackboard or Moodle) learning system.

Assessment Requirements

Assessment Policy

Faculty Policy - Unit Assessment Hurdles

(<http://www.infotech.monash.edu.au/resources/staff/edgov/policies/assessment-examinations/unit-assessment-hu>)

Assessment Tasks

Participation

• Assessment task 1

Title:

Assignment 1 - SQL Server and Data Warehousing

Description:

As per the title, this might involve some OnLine Analytical Processing (OLAP) and a written report. The mathematics should be quite friendly.

Further details will be provided.

Weighting:

20%

Criteria for assessment:

Perform some individual practical task based on the content covered in classes. Write some sort of report analyzing the given task based on the obtained results.

Further details will be provided.

Due date:

Week 6, Thursday 5 April 2012

Remarks:

You will be expected to submit your assignment in both printed hard copy and soft electronic copy - unless explicitly told otherwise by both your lecturer and your tutor.

Your work is expected and required to be your own work. See "Other Information" for the consequences of plagiarism, etc.

• Assessment task 2

Title:

Assignment 2 - ``Data Mining''

Description:

As per the title, there will be some analysis of some data, some of which might entail varying degrees of mathematics.

Further details will be provided.

Weighting:

20%

Criteria for assessment:

Perform some practical task based on the content covered in classes. Write a business report analyzing the given task based on the obtained results - possibly with some sort of cost-benefit analysis involving some probabilities and other mathematics.

Assessment Requirements

Further details will be provided.

Due date:

Week 11, Friday 18 May 2012

Remarks:

You will be expected to submit your assignment in both printed hard copy and soft electronic copy - unless explicitly told otherwise by both your lecturer and your tutor.

If there is hypothetically any group work, then students would form their groups in class and then - at the end of the assignment - comment on the degree of contribution of the various group members.

Your work is expected and required to be your own work. See "Other Information" for the consequences of plagiarism, etc.

Examinations

- **Examination 1**

Weighting:

60%

Length:

3 hours

Type (open/closed book):

Closed book

Electronic devices allowed in the exam:

None

Assignment submission

It is a University requirement

(<http://www.policy.monash.edu/policy-bank/academic/education/conduct/plagiarism-procedures.html>) for students to submit an assignment coversheet for each assessment item. Faculty Assignment coversheets can be found at <http://www.infotech.monash.edu.au/resources/student/forms/>. Please check with your Lecturer on the submission method for your assignment coversheet (e.g. attach a file to the online assignment submission, hand-in a hard copy, or use an online quiz).

Online submission

If Electronic Submission has been approved for your unit, please submit your work via the VLE site for this unit, which you can access via links in the my.monash portal.

Extensions and penalties

Submission must be made by the due date otherwise penalties will be enforced.

You must negotiate any extensions formally with your campus unit leader via the in-semester special consideration process:

<http://www.infotech.monash.edu.au/resources/student/equity/special-consideration.html>.

Returning assignments

Students can expect assignments to be returned within two weeks of the submission date or after receipt, whichever is later.

Referencing requirements

Students are encouraged but not required to write in LaTeX.

In any event, referencing styles such as any of those used by the Computer Journal, the Artificial Intelligence Journal, the Intelligence Journal, Springer LNAI/LNCS (Lecture Notes in Artificial Intelligence / Lecture Notes in Computer Science), IEEE, Journal of the ACM should be fine.

Make your work readable, intelligible and coherent.

Other Information

Policies

Monash has educational policies, procedures and guidelines, which are designed to ensure that staff and students are aware of the University's academic standards, and to provide advice on how they might uphold them. You can find Monash's Education Policies at:

<http://policy.monash.edu.au/policy-bank/academic/education/index.html>

Key educational policies include:

- Plagiarism
(<http://www.policy.monash.edu/policy-bank/academic/education/conduct/plagiarism-policy.html>)
- Assessment
(<http://www.policy.monash.edu/policy-bank/academic/education/assessment/assessment-in-coursework-p>)
- Special Consideration
(<http://www.policy.monash.edu/policy-bank/academic/education/assessment/special-consideration-policy.h>)
- Grading Scale
(<http://www.policy.monash.edu/policy-bank/academic/education/assessment/grading-scale-policy.html>)
- Discipline: Student Policy
(<http://www.policy.monash.edu/policy-bank/academic/education/conduct/student-discipline-policy.html>)
- Academic Calendar and Semesters (<http://www.monash.edu.au/students/key-dates/>);
- Orientation and Transition (<http://www.infotech.monash.edu.au/resources/student/orientation/>);
and
- Academic and Administrative Complaints and Grievances Policy
(<http://www.policy.monash.edu/policy-bank/academic/education/management/complaints-grievance-policy>)
- Codes of Practice for Teaching and Learning
(<http://www.policy.monash.edu.au/policy-bank/academic/education/conduct/suppdocs/code-of-practice-tea>)

Student services

The University provides many different kinds of support services for you. Contact your tutor if you need advice and see the range of services available at www.monash.edu.au/students. For Sunway see <http://www.monash.edu.my/Student-services>, and for South Africa see <http://www.monash.ac.za/current/>

The Monash University Library provides a range of services and resources that enable you to save time and be more effective in your learning and research. Go to <http://www.lib.monash.edu.au> or the library tab in my.monash portal for more information. At Sunway, visit the Library and Learning Commons at <http://www.lib.monash.edu.my/>. At South Africa visit <http://www.lib.monash.ac.za/>.

Academic support services may be available for students who have a disability or medical condition. Registration with the Disability Liaison Unit is required. Further information is available as follows:

- Website: <http://monash.edu/equity-diversity/disability/index.html>;
- Email: dlu@monash.edu
- Drop In: Equity and Diversity Centre, Level 1 Gallery Building (Building 55), Monash University, Clayton Campus, or Student Community Services Department, Level 2, Building 2, Monash University, Sunway Campus
- Telephone: 03 9905 5704, or contact the Student Advisor, Student Community Services at 03 55146018 at Sunway

Other

Reading List

"*Managing Customer Relationships: A Strategic Framework*", by D. Peppers and M. Rogers [ISBN-10: 0470423471 | ISBN-13: 978-0470423479], 2nd edition, 2011.

Practical Business Intelligence with SQL Server 2005, by John C. Hancock and Roger Toren, Addison Wesley, 2006

The Microsoft Data Warehouse Toolkit, by Joy Mundy and Warren Thornthwaite, John Wiley & Sons, 2006

G K Gupta, *Introduction to Data Mining with Case Studies*, Prentice-Hall of India Private Limited, New Delhi India, 457pp.

This next reference is heavy mathematically, but it is most probably the future of ``data mining": C S Wallace (2005), *Statistical and Inductive Inference by Minimum Message Length*, Springer, 432pp.

Here are some further references of possible interest:

William H. Inmon, "*Building the data warehouse*", 4th edn, chaps 1 and 2.

Efrain Turban et al., "*Business intelligence: a managerial approach*", chap. 1

Michael Berry and Gordon Linoff, "*Data Mining Techniques*", 2nd edn, chap. 1

Chris Todman, "*Designing a data warehouse supporting CRM*", chaps 1 and 2