

Gearing You For Growth

Bursaries | **Business Skills** | Coaching and Mentoring | Computer Skills | E-Learning | Learnerships | Skills Development | Virtual Training

CRM: An Introduction to Customer Relationship Management

Course Overview

This one-day course will help you introduce the different facets of Customer Relationship Management (CRM) to delegates.

It will also help them identify who their customers really are, analyse the key components of CRM, and understand how it integrates within an organization.

Course Objectives

This course will:

- Demonstrate an understanding of the terms and benefits of CRM on a company's bottom line.
- Analyze the different components of a CRM plan.
- Develop a checklist for readiness and success in CRM.
- Describe how CRM creates value for organizations and customers.
- Consider developmental roles that have the greatest impact on CRM.

Prerequisite

There are no prerequisites.

Target

This course is for Administrators, Account Managers, Managers, Sales Managers and Sales Teams.

Duration

- 1 Day



Course Outline

Customer Relationship Management

To begin, delegates will look at what CRM programs they are involved in and how these programs have affected their lives. Delegates will also explore the meaning of CRM and its potential value.

What CRM Is and Who It Serves

Next, delegates will look at different types of CRM programs and the needs they can serve.

Checklist for Success

This session will explore evaluation metrics and privacy issues.

Requirement Driven Product Selection

During this session, delegates will look at the Requirement Driven Product Selection process. This process requires defining the business need (or pain or problem, depending on the issue), deciding which functions are needed to meet the requirements, and then defining the products that support the selection.

Considerations in Tool Selection

This session will look at ways to narrow the scope of their fields and to get the right people to move the CRM program along.

Strategies for Customer Retention

Next, delegates will explore ways to retain customers through a large group discussion.

Building the Future

During this session, delegates will explore the four pillars of CRM and how they can use the pillars to help others embrace the CRM plan.

Homegrown vs. Application Service Provider

Delegates will look at the advantages and disadvantages of developing a program in-house versus using an Application Service Provider.

The Development Team

This session will give delegates the framework for building a stellar CRM team.

Evaluating and Reviewing Your Program

To conclude the day, delegates will look at some evaluation tools, including customer profiles and life cycles.