



Talented Transformations

# BUILDING BLOCKS OF CRM WORKSHOP

**Price : \$2400**

**Course Objective:**

To equip participants with a comprehensive understanding of Customer Relationship Management (CRM), its core components, and how to effectively implement and utilize CRM systems to enhance customer interactions and business performance.

**Duration:**

3 Days (6 hours per day)

**Day 1: Introduction to CRM and Understanding CRM Concepts**

**Morning Session (9:00 AM - 12:00 PM)**

- 1. Welcome and Workshop Overview**
  - Introduction to the workshop
  - Objectives and outcomes
  - Overview of the agenda
- 2. Understanding CRM**
  - Definition of CRM
  - History and evolution of CRM
  - Importance of CRM in modern business
- 3. CRM Components**
  - Operational CRM
  - Analytical CRM
  - Collaborative CRM

**Break (12:00 PM - 1:00 PM)**

**Afternoon Session (1:00 PM - 4:00 PM)**

- 1. Key Functions of CRM**
  - Sales Force Automation (SFA)
  - Marketing Automation
  - Customer Service and Support
- 2. Benefits of CRM**
  - Enhanced customer satisfaction
  - Improved sales and revenue
  - Better customer retention
  - Increased efficiency and productivity
- 3. Case Studies and Real-world Applications**
  - Examples from various industries
  - Group discussion on successful CRM implementations
- 4. Q&A and Recap of Day 1**

**Day 2: Implementing CRM Systems**

**Morning Session (9:00 AM - 12:00 PM)**

- 1. Planning and Strategy**
  - Assessing business needs
  - Setting CRM goals and objectives
  - Building a CRM strategy
- 2. CRM Selection Criteria**
  - Evaluating CRM software options
  - Key features to look for
  - Vendor comparison
- 3. Implementation Process**
  - Steps to successful CRM implementation
  - Common challenges and solutions

**Break (12:00 PM - 1:00 PM)**

**Afternoon Session (1:00 PM - 4:00 PM)**

- 1. Data Management**
  - Data collection and integration
  - Data quality and cleansing
  - Data privacy and security
- 2. Customization and Integration**
  - Customizing CRM for business needs
  - Integrating CRM with other systems
- 3. User Training and Adoption**
  - Importance of user training
  - Strategies to encourage adoption
  - Overcoming resistance to change
- 4. Q&A and Recap of Day 2**



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**Day 3: Maximizing CRM Value**

**Morning Session (9:00 AM - 12:00 PM)**

**1. Advanced CRM Features**

- CRM Analytics and Reporting
- Customer Segmentation
- Predictive Analytics

**2. Customer Journey Mapping**

- Understanding the customer journey
- Mapping customer touchpoints
- Enhancing customer experience

**3. CRM Best Practices**

- Regular updates and maintenance
- Continuous improvement
- Measuring CRM success

**Break (12:00 PM - 1:00 PM)**

**Afternoon Session (1:00 PM - 4:00 PM)**

**1. Future Trends in CRM**

- AI and Machine Learning in CRM
- Mobile CRM
- Social CRM

**2. Hands-on Workshop**

- Practical exercises with CRM software
- Simulating CRM scenarios
- Group projects and presentations

**3. Final Q&A and Feedback**

- Open floor for questions
- Collecting participant feedback
- Wrap-up and next steps

**Materials Provided:**

- Workshop handbook
- CRM software trial access
- Case study materials
- Presentation slides
- Certificate of Completion

**Pre-requisites:**

- Basic understanding of business processes
- Familiarity with customer service and sales concepts

**Target Audience:**

- Business managers and executives
- Sales and marketing professionals
- Customer service managers
- IT professionals involved in CRM implementation

This structured approach ensures participants leave with a thorough understanding of CRM principles, practical implementation skills, and the ability to leverage CRM systems for business growth.