Customer Relationship Management (CRM) Training Course

16 – 20 November 2026
Cape Town (South Africa)



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Introduction

In the highly competitive business landscape, building and maintaining strong customer relationships is crucial for long-term success. Customer Relationship Management CRM is a strategic approach that utilizes customer relationship management technology to effectively manage and analyze customer interactions throughout the entire customer lifecycle. This course is designed to equip participants with the essential customer relationship management skills and knowledge to implement successful CRM strategies, enhance customer satisfaction, and boost business profitability. Through hands-on applications and real-world scenarios, participants will learn how to leverage CRM tools and techniques to manage customer relationships, improve customer loyalty, and drive business growth.

Course Objectives

By the end of this course, participants will be able to:

- Understand the core concepts and principles of Customer Relationship Management CRM.
- Explore the customer lifecycle and identify key touchpoints for engagement.
- Apply CRM strategies to improve customer satisfaction and retention.
- Utilize CRM technologies to manage customer data, track interactions, and automate marketing efforts.
- Analyze CRM analytics to enhance business decisions and drive growth.

Course Outlines

Day 1: Introduction to CRM and Customer Lifecycle

- Definition and customer relationship management def: Understanding the true meaning of customer relationships.
- The customer lifecycle: Awareness, Acquisition, Retention, and Loyalty.
- Key components of CRM customer relationship management: Operational CRM, Analytical CRM, and Collaborative CRM.
- Benefits of customer relationship management: Enhanced insights, improved sales processes, and stronger client relationships.
- Practical Session: Mapping the customer journey and identifying engagement opportunities.



Day 2: CRM Strategies and Customer Engagement

- Developing effective customer relationship management strategies for various business models.
- Segmentation and targeting: Identifying high-value customers for optimized engagement.
- Personalizing customer interactions to build customer relationships and enhance loyalty.
- Techniques for Lead Generation, Lead Scoring, and Lead Nurturing.
- Case Study: Successful CRM strategies in leading companies demonstrating the advantages of customer relationship management.

Day 3: CRM Technologies and Automation

- Overview of popular CRM platforms: Salesforce, HubSpot, Zoho CRM, Microsoft Dynamics.
- Managing customer databases and ensuring data integrity.
- Automation in CRM: Email marketing, Sales pipelines, and Customer follow-ups.
- Integration with other business tools ERP, Marketing Automation, Social Media.
- Hands-on Workshop: Setting up and customizing a CRM dashboard to visualize customer relationship management analytics.

Day 4: Data Analysis and Measuring CRM Success

- Understanding CRM analytics and performance indicators.
- Key Metrics: Customer Retention Rate, Customer Lifetime Value CLV, Conversion Rate, Net Promoter Score NPS.
- Using data to drive decision-making and optimize customer relationship management processes.
- Reporting and visualization of customer insights.
- Group Exercise: Analyzing CRM data to identify growth opportunities and improve customer relationships.

Day 5: Implementing CRM and Best Practices

- Steps to successfully implement a customer relationship management system in an organization.
- Change management and user adoption of CRM systems.
- Customer relationship management best practices: Ensuring data security and compliance GDPR, CCPA.
- Final Project: Designing a CRM strategy for a business scenario.
- Wrap-up and Feedback Session for reflection and improvement.

Why Attend this Course: Wins & Losses!

- Master CRM skills to build strong and lasting customer relationships.
- Enhance customer satisfaction and retention through effective CRM strategies.
- Leverage CRM technologies to streamline sales and marketing processes.
- Drive business growth by effectively managing customer relationships and understanding their needs.



Conclusion

Customer Relationship Management CRM is a powerful tool for enhancing customer loyalty, improving sales processes, and driving business growth. This course equips participants with the practical skills to effectively manage customer interactions, utilize CRM technologies, and optimize business strategies.

Through hands-on experience and real-world applications, participants will be ready to transform their customer engagement and achieve lasting business success.

