BLACKBIRD FOR TRAINING

CRM Data Management

Toronto (Canada)

17 - 21 May 2027

CRM Data Management

Code: CC32 From: 17 - 21 May 2027 City: Toronto (Canada) Fees: 5900 Pound

Introduction

This course focuses on CRM data management from a practical and advanced operational perspective, helping project administrators and operations teams use CRM data and system capabilities more effectively for tracking, analysis, reporting, and better venue management decisions.

The course addresses how to organize client data, improve record quality, increase system visibility, and develop reliable tracking workflows that support client relationship management from initial engagement through service delivery or event execution. It also covers CRM control, user access, data security, reporting accuracy, and standardized system usage across teams.

The content is designed to connect data management, process improvement, dashboards, performance analysis, and client engagement tracking. Participants will learn how to use CRM not only as a database, but as an operational and analytical tool that supports decision-making, improves client follow-up, and strengthens venue and service management.

Course Objectives

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

- Understand the role of CRM data management in improving operational efficiency.
- Organize client, project, venue, and service data within the CRM system.
- Improve data quality through validation, cleaning, and continuous updating.
- Build accurate tracking workflows for clients, requests, opportunities, and activities.
- Strengthen CRM control, user access, and sensitive data protection.
- Prepare reports and dashboards that support venue and operations decisions.
- Use CRM insights to improve client experience and service response.
- Analyze client engagement data to identify improvement opportunities.
- Link client records with daily operations, bookings, venues, and service delivery.
- Reduce errors caused by weak documentation, incomplete records, or duplicate data.
- Develop standardized procedures for record management and follow-up.
- Use CRM insights to support planning, decision-making, and relationship management.

Course Outlines

Day 1: CRM Data Management and Its Role in Operations.

- Understanding CRM data management in project and operations environments.
- Differentiating between storing data and using data for decision support.
- Identifying core CRM data types: clients, requests, venues, interactions, and opportunities.
- Understanding how data quality affects follow-up, reporting, and client experience.
- Defining the lifecycle of a client record inside the CRM system.

- Linking client data with venue management and event operations.
- Recognizing common mistakes in data entry and record updating.
- Practical exercise on assessing the quality of client records in a CRM system.

Day 2: Data Quality, Control, and User Access.

- Setting clear standards for data entry and record updates.
- Cleaning duplicate, outdated, or incomplete CRM data.
- Classifying clients and requests by status, priority, service type, and stage.
- Managing user permissions based on roles and responsibilities.
- Protecting sensitive client and operational data.
- Establishing regular data quality review procedures.
- Improving record visibility to support cross-team follow-up.
- Practical exercise on reorganizing a simplified client database.

Day 3: Client Tracking and Relationship Management Workflows.

- Building a clear client journey from first contact to closure.
- Recording communication points, notes, next actions, and follow-up owners.
- Improving the management of inquiries, requests, opportunities, and open tasks.
- Using reminders and alerts to reduce delays in follow-up.
- Coordinating between project teams, operations teams, and clients.
- Tracking venue, room, or service status linked to client requests.
- Analyzing causes of delayed follow-up or missed opportunities.
- Practical application of designing a client or project tracking workflow in CRM.

Day 4: Reporting and Insights for Venue and Operations Management.

- Defining key CRM indicators for client and venue management.
- Preparing reports on active clients, open requests, and delayed follow-ups.
- Analyzing booking, venue, service, or request data to support planning.
- Using dashboards to improve daily operational visibility.
- Turning CRM data into actionable observations and management insights.
- Preparing reports that help management assess performance and operational pressure.
- Linking client indicators with service quality and response performance.
- Workshop on preparing a concise operational report from CRM data.

Day 5: CRM Optimization and Efficient Operating Model.

- Reviewing current CRM usage and identifying improvement opportunities.
- Building standardized procedures for data, tracking, and reporting.
- Improving information flow between client-facing, project, and venue teams.
- Preparing checklists for record review before approval or closure.
- Developing tracking models that improve response speed and accountability.
- Defining controls for privacy, security, and reporting accuracy.
- Preparing an improvement plan for CRM usage within the department.
- Final application on analyzing an operational case and preparing a dashboard with recommendations.

Why Attend This Course: Wins & Losses!

- Improve the ability to manage client and project data in a structured way.
- Increase record quality and reduce duplicate or incomplete data.
- Improve follow-up visibility between project and operations teams.
- Speed up responses to clients and open requests.
- Build accurate reports that support better management decisions.
- Strengthen CRM access control and protection of sensitive information.
- Improve venue, room, or service management linked to client needs.
- Use data to detect operational issues earlier.
- Improve tracking of opportunities and long-term client relationships.
- Reduce reliance on manual follow-up or scattered files.
- Improve project administrator productivity through better CRM usage.
- Turn the CRM system into an effective operational and analytical tool.

Conclusion

This course provides a practical framework for improving CRM data management capability, with a focus on control, security, visibility, reporting, client engagement tracking, and venue management support.

The course begins by explaining the role of CRM data in operational decision-making, then moves into data quality, access control, client tracking workflows, and reporting insights that improve venue and service management. The final day connects all learning areas into a practical operating model that supports better CRM use across the department.

The program helps participants treat CRM as an integrated operational platform for documentation, follow-up, analysis, reporting, and client relationship management. It also provides practical tools to improve data accuracy, reduce errors, protect information, and increase the quality of management reporting.

By the end of the course, participants will be better able to use CRM data and system capabilities to support better decisions, improve client engagement, and optimize venue and operations management within the organization.

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