XCELERATE TRAINING INSTITUTE

your learning & development partner

CUSTOMER SERVICE

Customer Relationship Management (CRM)

DURATION	LANGUAGE	FORMAT
5 days	**English**	**Classroom / Online**

Upcoming dates

Dates	Venue	Format	Fee
15 – 19 Mar 2027	Live online	Online (live)	**€1,200**
26 – 30 Apr 2027	Barcelona	Classroom	**€4,800**
27 Sep – 1 Oct 2027	Live online	Online (live)	**€1,200**

Register or ask a question

Online: x8ti.com/course/customer-relationship-management-crm/

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Customer Relationship Management (CRM)

Introduction

Introduction

With the onset of building a relationship with the customer, it is very important to record the information in a manner it is readily available. This customer relationship management (CRM) certification training course equips you to understand and apply the aspects of the CRM and manage the relationship well.

The business demands critical follow up and customers definitely appreciate an individual go the extra mile to serve them. This training ensures greater insight to empower the participants in learning the different mechanisms of the CRM and have high level of customer satisfaction.

This Xcelerate Training Institute course will enable the individual to support the customer with all the details readily available in the Customer Relationship Management System and ensure a fact-based interaction.

Learning Objectives

The customer relationship management (CRM) certification training trains you to understand the importance and application of the CRM system. It helps in noting the details and responding to the customer using a fact-based method.

It allows saving all the information in one place and create a follow through in a professional manner. The business information no longer is based on an individual and is available to the organization and can be used by the required individuals.

Upon completing this Customer Relationship Management (CRM) Certification Training Course successfully, participants will be able to:

- Recognize why Customer Relationship Management (CRM) system is essential
- Know the best practices of CRM implementation
- Explain the value generated by using the customer relationship management tool
- Support teams and individuals to strategize and set key milestones for using the CRM
- Determine the benefits of using a CRM system
- Application of the CRM system
- Support the customer by using the CRM
- Apply the learnings to enhance customer service, sales and marketing
- Document the interactions with the customer to follow through

Training Methodology

The Customer Relationship Management (CRM) Certification Training Course will be conducted in a highly effective manner and will comprise of the following training methods:

- Presentations
- Live Online Tool Usage
- Examples
- Group Discussions
- Assignments
- Lectures & Seminar Method
- Activities
- Polls
- Surveys
- Whiteboard interaction
- Case Studies & Functional Exercises

The program structure is a detailed and interactive session, following a two-way communication, we work with the participant to ensure they are able to get a practical experience of how to interact with the customer.

At ZTS, we use the ‘Do-Review-Learn-Apply’ model.

Benefits For Your Organization

Organizations who want to showcase a professional approach when interacting with the customer and want to have all information readily available using a systemic approach than a person-based approach should nominate their employees for this program.

Companies who nominate their employees to participate in this Customer Relationship Management (CRM) Training Course can benefit in the following ways:

- Train their employees in building the right attitude of entering data in the CRM
- Know the benefits of the CRM and learn how to use it
- Create a strategy to implement the CRM process in the organization
- Have all the customer information readily available anywhere at any time
- Learn the best practices in Customer Relationship Management administration
- Learn ways to analyse the information and know how to create reports
- Create a fact-based interaction with the customer
- Have business information no longer be person dependent and be available to the organization
- Have a process-based approach

Benefits For You

An individual can benefit from this program in various ways only out of their willingness and participation.

Individuals who participate in this Customer Relationship Management (CRM) Certification Training Course can gain from it in the following ways:

Target Audience

This Customer Relationship Management (CRM) Certification Training Course is ideal for:

- Customer Relationship Managers
- Any individual who uses the CRM – Customer Relationship Management System
- Customer Service Representatives
- Sales Support Representatives
- Call Centre or BPO Executives
- Business Development Executives
- Receptionist

This Customer Relationship Management (CRM) Certification Training Course would be suitable for anyone who is interacting with the customer on the phone or face to face and will look at recording the information in the CRM system in a systematic and fact-based manner, so that it enables better follow through and offer excellent service.

- Know what a CRM is
- Recognize why Customer Relationship Management (CRM) is essential
- Support the customer by using the CRM
- Determine the uses of the CRM system
- Apply the learnings to the customer service, sales and marketing
- Use a fact-based approach to interact with the customer
- Recognize the best practices of CRM implementation

Course Outline

Introduction

- What is a CRM?
- Know the pre – requisites
- Develop a learning path

Build a road map

- Use the bridge model – create a destination
- Know your mistakes when using the CRM
- Why individuals find it hard to use the CRM?
- Know where you stand on that road?

Importance of the CRM

- Why is it important to have the CRM?
- Optimize the customer relationship by using the CRM

- Benefits of the CRM
- Understand the best practices

Strategy & Planning

- Develop an organization strategy for the CRM
- Look at the future when planning
- Planning of interactions with the customer
- Deal with the obstacles that come in the way

Finalize the Tool

- Finalize the tool which fits the requirement of the organization basis the strategy
- Manage day to day requirements
- Organization Settings
- Data Security
- User Management
- Customization

CRM used in Customer Service

- Effective use of the CRM when interacting with the customer
- Support the customer with the right knowledge
- Detailed Information
- Communication Channels

CRM used in Sales & Marketing

- Automation
- Customer Relationship Activity and Connect
- Create a check list for business target success
- Be a champion – make the CRM work for you

Follow Through

- Follow up is Critical
- Deal with the roadblocks and obstacles
- Create a plan for the next interaction and ways to connect
- Effective delegation to the system

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Registration Form

Customer Relationship Management (CRM)

Preferred dates: ..... Venue or online: .....

Duration: 5 days Language: .....

Please complete and email this form to us, or register online. We confirm your place and send the invoice within one working day.

Delegate information

Full name (Mr / Ms / Dr / Eng): .....

Position: ..... Telephone / mobile: .....

Official email: ..... Personal email: .....

Company information

Company name: .....

Address: .....

City / country: ..... VAT / tax number: .....

Person responsible for training & development

Full name (Mr / Ms / Dr / Eng): .....

Position: ..... Telephone / mobile: .....

Email: .....

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Register online
Open the course page