CRM & Customer Engagement Training Course

Learn how to turn customer engagement into valuable relationships

Course Dates

Please note: This course is currently only available in-house

Every brand seeks engagement. Yet, engagement is not an end in itself, and many attempts at engagement can be short-lived, silo'd, inconsistent and worst of all irrelevant – contributing little or potentially damaging the relationship between a brand and its customers.

This CRM and customer engagement training course provides the framework for relevant customer engagement through the lens of customer relationship management. It provides strategies to approach engagement with a clearer view of how and who to engage, with what, where and when – across the customer journey.

The day provides guidance on setting a vision and purpose for CRM: tools and tips for the development of an insightful joined-up CRM strategy and the basis for building and delivering effective CRM plans. It also incorporates guidance on the use of data and technology, which grease the wheels of CRM.

Course Programme

Setting the scene

- The 8 building blocks of CRM
- CRM – good and bad

4 Steps to setting a CRM vision

- The brand purpose
- The customer and what matters to them
- The truth about the relationship
- The purpose and role for CRM and Customer Engagement

Setting meaningful objectives

- Setting business objectives from the customer's point of view
- Translating objectives into outcomes and KPIs
- Knowing what success looks like: measurement and reporting

Knowing your customer

- What defines your customer?
- What defines a valuable customer?
- Creating workable customer segmentation
- Tackling Big Data and knowing what matters

- Guidance on data protection and regulation
- The importance of the single customer view and steps to achieving it
- The rise of behavioural economics

Defining the relationship and customer experience

- The truth about engagement and commitment
- Why there are two Rs in Relationship
- Why relationships fail and what makes a successful relationship
- Organisational collaboration and its effect on the customer experience
- Why humanity and technology make good bed-fellows
- Mapping the customer journey: the backbone of the relationship
- Identifying areas of greatest importance and influence
- How small things can make a difference
- Balancing quick wins with the longer term

Creating your CRM and Customer Engagement plan

- Where to start
- Creating the layers of the CRM plan
- Mapping touchpoints, channels and processes
- How to combine online and offline channels effectively
- Don't run before you can walk
- Budget optimization

Improvement and evolution

- Meaningful measurement
- The macro and micro of measurement
- The importance of test and learn

Wrap up

- Guiding principles
- Guidance on the selection of technology partners
- Useful tools and resources

Benefits

Following the CRM & Customer Engagement course, you will have:

✓ A clear understanding of how CRM and Customer Engagement influences brand equity, customer value and profitability
✓ Guidance on how to develop a CRM vision, strategy and plan
✓ A greater understanding of the value of data and how to use it
✓ A framework for creating more relevant, insightful engagement
✓ Tools and tips for measurement and evaluation
✓ Guidance on selecting technology partners
✓ An appreciation of how small things in the world of CRM can often make a big difference to the bottom line

All attendees receive an attendance certificate, digital copies of the course materials and four weeks post course support online.

Audience

The CRM & Customer Engagement training course is suitable for:
- Anyone who is interested in taking a more holistic view of customer engagement
- Anyone who thinks that understanding CRM will make them better at what they do
- Clients who need to better understand CRM in the context of their own silo
- Account Manager to Account Director level in agencies who need to understand CRM from a strategic perspective
- Client service and planning in digital, branding, design and advertising agencies
- Creatives who want to better understand the world of CRM

What people say

An excellent course that will ensure that you go away feeling confident about implementing a CRM strategy into your organisation. Full of examples and practical suggestions delivered by an extremely knowledgeable trainer.

Caroline Gracey, Assistant Director Ministerial Public Appointments
Department for Business, Innovation and Skills

Department for Business, Energy & Industrial Strategy

As someone with no marketing background and an ambitious task to implement a CRM system, I found this course incredibly reassuring and well structured. The trainer was incredibly knowledgeable, provided a lot of information and grounded this in real life examples that made it easier to understand.

Catherine Boyd, Executive Officer
Wonkhe

WONKHE

Excellent syllabus to get to the heart of CRM philosophy. Asks why does a business need to use CRM, for what purpose and what result needs to be gained from it to make it invaluable to an organisation.

Lee Maher, Head of Sales - EMEA
Kentec Electronics

Kentec Electronics Ltd

Course was simply excellent – both content and delivery. Relevant and topical examples too.

Laura Dunne, Head of Marketing & Membership
Lincolnshire Co-op

Great course delivered by a very engaging tutor!

Richard Whittaker, Member Engagement Manager
Lincolnshire Co-op

The small group allowed the trainer to focus and relate examples back to the business area of each of the group, which was fantastic.

Fern Saunders, Email Marketing Executive
Institute of Directors

The tutor was very knowledgeable and approachable and the other delegates all had slightly different experiences and challenges to bring to the table. The most valuable content came from group discussions.

Natalie Ryan, Data & Operations Manager
Triangle Management Services

I recommend anyone to do the CRM strategy course. Anyone who is looking to make their company more efficient and proactive, and looking to see which CRM tools will help them with their strategy, vision, customer engagement, should really do this course. You will be able to utilise all the information from this course to your organisation. Mike is a excellent trainer.

Manisha Pandit, Renewal Account Executive
Rocket Software Ltd

A perfect course for any point of a CRM journey. Marketer or not, this course offers valuable knowledge to help your business gain, retain and reactivate customers.

Robert Phillips, Marketing Assistant
Fisher Jones Greenwood

I really enjoyed this course. It gave me lots to think about and also gave validation to what we are doing well. One thing I learned is that "change is a constant".

Sheila Carroll, Client Relationship Specialist
Shelton Development Services Ltd

A great course run by a passionate industry professional. Practical content supported by real-life examples. Looking forward to using this in my work!

Genevieve Sargent, Consultant
The Future Customer

Great ideas and insightful commentary on what is happening in CRM at the moment. Lots of ideas have stemmed from the day!

Keely Brewer, Communications Executive
ROA

A brilliant introduction to CRM strategy with an engaging and helpful course leader. I definitely will be signing up for more courses!

Anna Murawski, Digital Sales Manager
ADA

The trainer was extremely informative, helpful and passionate about the subject. I have taken away a lot from this course and it also sparked a lot of ideas how to building a better relationship with our donors. Thank you!

Jo Whitwood, Data & Fundraising Coordinator
The Royal Marines Charity

An excellent course – perfect for those, like us, just starting to learn about CRM and its applications. We came away with a much deeper understanding and buzzing with ideas for applying the theory!

Ellen Fraser, Business Support Assistant
Smithers Purslow

Excellent course to kick start or to formalise CRM thinking for businesses. Mike Cullis is an excellent trainer with lots of patience and lots of useful resources to move you forward wherever you are in your CRM journey.

Kassie Siwo-Gasa, Digital Marketing Manager
M&G Investments

The CRM Strategy course has allowed me to visualize more clearly what framework to follow in order to engage better with our customers. I really enjoyed the course and the learning environment suited my needs perfectly.

Nicole Allison, Marketing Research Manager
The Football League

The CRM Strategy course was very interesting and engaging. The trainer, Mike Cullis, was highly informative and addressed all of my questions.

Sally Newman, Marketing Graduate Associate
Southampton Solent University Conference Centre

The CRM Strategy course provides excellent insight into the framework required for customer engagement through the lens of customer relationship management. It provided some great tools & tips as we walked through the customer Journey. The venue at Wallacespace was top notch. Highly Recommend this course if your setting out on your own CRM Journey.

Ian Fowler, IT Business Analyst
Nisa Retail

This course is fantastic for people who have entry level knowledge of CRM strategy or for people who have established roles in the field to be able to gain a different outlook on their strategy.

Jack Cockburn, Marketing Manager
Ridgewall