



Sales, Marketing and Customer Service

Client Relationship Management (CRM)

Course Introduction

Client relationship management plays a vital role in the success of any business. This helps a business to recognize the value of its clients and to capitalize on improved client relations. Having a better understanding of the client's purchasing habits, opinions and preferences, the more a business can respond to address their needs. This training program is designed to enable participants to enhance their ability to manage client relationships, by understanding and implementing the latest CRM strategies and tools, developing their analytical skills, plus enhancing their ability to build an integrated client-focused culture and Measure client satisfaction to boost organization's sales outcomes.

Target Audience

- Business Development Executives
- Sales / Marketing Managers
- Account Managers / Relationship Managers
- Sales Directors

Learning Objectives

- Understand the concept and functions of client relationship management (CRM).
- Understand the importance of CRM in promoting the organizations' sales and marketing targets.
- Identify CRM tools and solutions.
- Understand and apply CRM planning strategies.
- Master analyzing the provided product/service and the business situation.
- Master Analyzing client characteristics and expectations.

- Understand and apply Client journey planning strategies.
- Develop an integrated Information system to facilitate communication with clients.
- Create a strong CRM vision and goals.
- Develop the CRM Team.
- Master Developing a client-focused culture.
- Define the most common mistakes when using CRM.
- Measure client satisfaction with the provided service.
- Develop performance indicators to measure client service in the organization.

Course Outline

• DAY 01

Introduction to Client Relationship Management (CRM)

- The concept of client relationship management (CRM).
- The importance of CRM in promoting the organizations' sales and marketing targets.
- Client relationship management functions.
- Understanding the relationship between the client and the organization.
- The difference between a traditional and holistic focus in CRM.
- Overview: CRM tools and solutions.

Effective Planning for CRM

- CRM planning strategies.
- Analyze the provided product/service (Best strategies and Practices)
- Determine the strengths and weaknesses of the provided product/service.

- Business situation analysis.
- Analyze client characteristics and expectations.
- Identify your Ideal Client.
- Planning for Client Interactions.
- Client journey planning strategies.

• Day 02

How to Implement CRM?

- Creating a strong CRM vision and goals.
- Develop the CRM Team.
- Choose the right CRM Solution.
- Identify Technology requirements.
- Develop an integrated Information system to facilitate communication with clients.
- Your guide to manage user security.
- Identify risks.
- Developing a client-focused culture.
- Manage change to adopt CRM.
- Develop the organization strategy for the CRM.
- Double the added value.
- How to manage Continuing requirements?
- Define your mistakes when using CRM.
- Practical Application.

• Day 03

Achieving client satisfaction:

- Measuring client satisfaction with the provided service.
- Client satisfaction model.
- Obstacles to obtaining client satisfaction.
- Client desired value model.
- Develop feedback channels.
- Client service automation.
- Develop performance indicators to measure client service in the organization.
- Strategies to enhance the performance of the client service team.

Action Plan

- At the end of the training, participants will be asked to develop a CRM plan relating to the department/industry they belong. The presented should include the details such as the profile of target clients, the strategies to be implemented, and how to measure the effectiveness of the plan. This will be presented to the class for discussion.

Confirmed Sessions

FROM	TO	DURATION	FEES	LOCATION
Dec. 8, 2025	Dec. 10, 2025	3 days	3950.00 \$	Austria - Vienna
Sept. 22, 2025	Sept. 24, 2025	3 days	3250.00 \$	UAE - Dubai