



# CRM: An Introduction to Customer Relationship Management

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This one-day course will help you introduce the different facets of Customer Relationship Management (CRM) to participants and show them how to identify who their customers really are, analyze the key components of CRM, and understand how it integrates within an organization.

This course will help you teach participants how to:

- Develop an understanding of the terms and benefits of CRM on a company's bottom line.
- Analyze the different components of a CRM plan.
- Develop their checklist for readiness and success in CRM.
- Identify how CRM creates value for organizations and customers.
- Identify developmental roles that have the greatest impact on CRM.

## Introduction and Course Overview

You will spend the first part of the day getting to know participants and discussing what will take place during the workshop. Students will also have an opportunity to identify their personal learning objectives.

## Customer Relationship Management

To begin, participants will look at what CRM programs they are involved in and how these programs have affected their lives. Participants will also explore the meaning of CRM and its potential value.

## What CRM Is and Who It Serves

Next, participants will look at different types of CRM programs and the needs they can serve.

## **Checklist for Success**

This session will explore evaluation metrics and privacy issues.

## **Requirement Driven Product Selection**

During this session, participants will look at the Requirement Driven Product Selection process. This process requires defining the business need (or pain or problem, depending on the issue), deciding which functions are needed to meet the requirements, and then defining the products that support the selection.

## **Considerations in Tool Selection**

This session will look at ways to narrow the scope of your field and to get the right people to move your CRM program along.

## **Strategies for Customer Retention**

Next, participants will explore ways to retain customers through a large group discussion.

## **Building the Future**

During this session, participants will explore the four pillars of CRM and how they can use them to help others embrace the CRM plan.

## **Homegrown vs. the Application Service Provider**

Participants will look at the advantages and disadvantages of developing a program in-house versus using an Application Service Provider.

## **The Development Team**

This session will give participants the framework for building a stellar CRM team.

## **Evaluating and Reviewing Your Program**

To conclude the day, participants will look at some evaluation tools, including customer profiles and life cycles.

## **Workshop Wrap-Up**

At the end of the day, students will have an opportunity to ask questions and fill out an action plan.