

Corporate Training Course: CRM Implementation

Overview

This course will teach you how to implement, maintain, and support a Customer Relationship Management (CRM) application in your company. With the skills gained from this course, you will be able to create and develop a responsive and robust CRM implementation.

Customer retention is critical for a company's lifetime profits. Customer Relationship Management is about how to work with customer related data to optimize business relationships with former, current, and prospective customers.

The skills obtained in this course will help you identify your specific business requirements; choose from different CRM software to meet your company's requirements; plan your project; install and configure the software; and use advanced features of CRM to manage customers, complete marketing campaigns, and manage client relations.

Outcome

By the end of the course, you should be able to meet the following objectives:

- Working with customer-specific data to optimize business relationships with former, current, and prospective customers
- Help you identify your specific business requirements
- Plan your project
- Install and configure the software
- Use advanced features of CRM to manage customers
- Complete marketing campaigns
- Manage client relations

Prerequisites

Working experience with Computer Software Applications

Course Outline

Module I. CRM Requirements Gathering and Planning

- Business Analysis, Data Collection and Data Analysis
- Project Management
- Best Practices

Module II. CRM Installation and Configuration

- Implement a new CRM installation in an organization
- Install and configure the different CRM components

Module III. CRM Sales Management

- Manage the sales process in an organization
- Utilize the CRM Sales Order Processing module

Module IV. CRM Marketing and Customer Relationships

- Create marketing materials
- Create and manage marketing campaigns
- Focus marketing on specific types of customers in the CRM environment