CUSTOMER RELATIONSHIP MANAGEMENT (CRM) & CUSTOMER RETENTION STRATEGIES TRAINING COURSE

Introduction

Customer Relationship Management (CRM) & Customer Retention Strategies is an executive-level programme designed to equip managers, sales professionals, customer experience teams and business leaders with the capabilities required to build stronger customer relationships, improve retention, increase customer lifetime value and create sustainable revenue from existing customers. Modern CRM extends beyond installing software. Effective customer relationship management requires an integrated approach combining customer strategy, data, people, processes, technology, communication and service delivery. Organizations need to understand who their customers are, what they value, how they interact with the organization, why they leave and what can be done to strengthen long-term relationships. The programme examines the complete customer relationship lifecycle, from customer acquisition and onboarding through engagement, service, retention, loyalty, account development, reactivation and advocacy. Participants will learn how to use CRM systems and customer intelligence to develop 360-degree customer profiles, segment customers, identify valuable accounts, monitor customer behaviour, personalize engagement and identify early warning signals of churn. The programme also addresses Customer Lifetime Value (CLV), churn analysis, retention economics, loyalty programmes, customer success, complaint management, cross-selling, up-selling and relationship-based revenue growth. A major focus is placed on aligning marketing, sales, customer service and operations around a common customer strategy so that CRM becomes an organizational capability rather than merely a technology platform.

Course Objectives

- Understand the strategic principles of Customer Relationship Management.
- Develop a customer-centric CRM strategy aligned with business objectives.

- Segment customers according to value, needs and behaviour.
- Build and manage comprehensive customer profiles.
- Map customer lifecycles and relationship touchpoints.
- Improve customer onboarding and engagement.
- Identify and analyze customer churn and retention risks.
- Develop effective customer retention strategies.
- Strengthen customer loyalty and advocacy.
- Apply CRM data to personalize customer interactions.
- Use CRM systems to support sales, service and marketing activities.
- Measure customer satisfaction, retention and relationship profitability.
- Increase Customer Lifetime Value through account development.
- Develop cross-selling and up-selling opportunities responsibly.
- Use analytics, automation and AI to strengthen customer relationships.

Course Modules

> Module 1: Strategic Customer Relationship Management
- Evolution and principles of CRM
- Strategic importance of customer relationships
- Customer-centric business models
- Developing a CRM strategy aligned with organizational objectives

> Module 2: Customer Segmentation, Profiling & Value Analysis
- Customer segmentation principles
- Customer profiling and personas
- Value-based customer segmentation
- Identifying strategic and high-value customers

> Module 3: Customer Lifecycle & Relationship Management
- Customer lifecycle stages
- Acquisition, onboarding and activation
- Customer engagement and relationship development
- Reactivation and customer win-back strategies

> Module 4: CRM Systems, Data & Customer Intelligence
- CRM systems and organizational applications
- Customer-data collection and management

- Building 360-degree customer profiles
- Data quality, governance and responsible customer-data use

> Module 5: Customer Engagement, Personalization & Communication
- Customer engagement strategies
- Personalized customer communication
- Relationship-based customer interactions
- Omnichannel customer engagement

> Module 6: Customer Retention, Churn & Loyalty Management
- Drivers of customer retention and churn
- Identifying customer attrition risks
- Retention strategies and interventions
- Customer loyalty and advocacy programmes

> Module 7: Customer Service, Complaints & Relationship Recovery
- Customer service and relationship management
- Complaint-handling systems
- Service recovery and relationship restoration
- Turning dissatisfied customers into retained customers

> Module 8: Customer Lifetime Value & Relationship Profitability
- Principles of Customer Lifetime Value
- Customer profitability analysis
- Retention economics and acquisition economics
- Improving customer value and relationship profitability

> Module 9: Cross-Selling, Up-Selling & Account Development
- Identifying customer expansion opportunities
- Needs-based cross-selling strategies
- Value-based up-selling techniques
- Strategic account development and share-of-wallet growth

> Module 10: CRM Analytics, Automation, AI & Continuous Improvement
- CRM KPIs and customer-performance dashboards
- Predictive analytics and churn modelling
- AI, automation and personalized customer engagement
- Continuous CRM and retention performance improvement