
Table of Contents: Customer Relationship Management (CRM) and Data Analysis & Reporting

Course Duration: 32 Hours (4 Sessions)

OUTLINES

Day 1 – Foundations of CRM (8 Hours)

Module 1: Introduction to Customer Relationship Management

- Definition and Evolution of CRM
- Importance of CRM in Modern Business
- Types of CRM Systems (Operational, Analytical, Collaborative)
- CRM Goals and Key Success Factors
- Benefits of Effective CRM Implementation
- Case Study: Successful CRM Implementation in a Leading Organization

Module 2: Understanding Customer Lifecycle & Customer Journey

- Customer Lifecycle Stages (Acquisition, Retention, Loyalty, Advocacy)
 - Mapping the Customer Journey
 - Identifying Key Touchpoints and Moments of Truth
 - Role of CRM in Enhancing Customer Experience
 - Practical Exercise: Designing a Customer Journey Map
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Day 2 – CRM Strategy and Implementation (8 Hours)

Module 3: Building a CRM Strategy

- Aligning CRM Strategy with Business Goals
- Identifying Customer Segments and Targeting
- Personalization and Customer Value Proposition
- Data-Driven Decision Making in CRM
- Common CRM Challenges and How to Overcome Them

Module 4: CRM Tools and Technologies

- Overview of Popular CRM Platforms (Salesforce, HubSpot, Zoho CRM, Dynamics 365)
 - CRM Features: Contact Management, Lead Tracking, Sales Automation, and Service Tools
 - Integrating CRM with Other Business Systems (ERP, Marketing Automation, etc.)
 - Hands-On Demo: Exploring a Sample CRM Dashboard
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Day 3 – Data Analysis and Reporting in CRM (8 Hours)

Module 5: Introduction to Data Analytics in CRM

- Role of Data in Enhancing Customer Relationships
- Types of Customer Data (Demographic, Behavioral, Transactional)
- Data Collection, Cleaning, and Management
- Understanding KPIs and CRM Metrics (Customer Retention Rate, CLV, NPS, etc.)
- Exercise: Identifying Key CRM Metrics for a Given Business

Module 6: CRM Reporting and Visualization

- Importance of Reporting in CRM Decision-Making
 - Creating Effective CRM Reports and Dashboards
 - Tools for Data Visualization (Power BI, Tableau, Excel Dashboards)
 - Reading and Interpreting Customer Data Reports
 - Hands-On Activity: Creating a Sample CRM Report
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Day 4 – Advanced Analytics, Insights, and Continuous Improvement (8 Hours)

Module 7: Predictive Analytics and Customer Insights

- Introduction to Predictive CRM Analytics
- Forecasting Sales and Customer Behavior

- Using AI and Machine Learning in CRM
- Sentiment Analysis and Customer Feedback Mining
- Case Study: Predictive Analytics for Customer Retention

Module 8: Enhancing CRM Effectiveness & Reporting Best Practices

- Linking Analytics to Strategic Decision-Making
 - Continuous Improvement through Data Insights
 - Data Privacy, Security, and Ethical Use of Customer Data
 - Building a Culture of Customer-Centricity
 - Capstone Project:
 - Analyze Sample CRM Data
 - Develop a Data-Driven CRM Strategy Report
 - Present Insights and Recommendations
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End of Program

Assessments and Wrap-Up

- Knowledge Check Quiz
 - Group Presentation on CRM & Data Insights
 - Feedback and Key Takeaways
 - Certificate of Completion
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Learning Outcomes

By the end of this 4-day program, participants will be able to:

1. Understand CRM concepts, tools, and strategies.
 2. Map and improve customer journeys using CRM data.
 3. Analyze customer data to drive decision-making.
 4. Create insightful reports and dashboards.
 5. Use predictive analytics to forecast trends and enhance customer retention.
 6. Apply data ethics and privacy principles in CRM practices.
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