Advanced Customer Relationship Management (CRM)

Category	Description	Content	Proposed Training Dates
Advanced Customer Relationship Management	**Customer Lifecycle Engagement**	**Introduction to Customer Relationship Management** • Training on how to find and maintain valid and relevant customer information while staying in compliance with Canadian anti -spam legislation • Develop the skills to research customer businesses, products and services to gain knowledge of a customer's business and enhance the sales opportunity • Learn the skills to and the importance of tracking communication history • Understand the value of and develop the skill to create communication and engagement plans • Develop the skills necessary to create and manage your customer's organizational and corporate hierarchies	
	Managing Customers and Prospects	**Advanced Sales Management and Execution** • Learn the theory, application and importance of lead generation • Training on the practical skills to improve lead generation through search engine optimization using social media, direct mail, newsletters, and marketing • Skills training in advanced opportunity management, a sales skill set for nurturing leads through to purchase order, including preparing a sales script, activity planning, tracking communications, and leveraging relationship insights all for a better sales result • Learn how to better analyse and use sales information daily to make the most of each day **Advanced Case Management and Customer Service** • Training on your case management skills to ensure that customers are replied to sooner, issues are resolved faster, historical information is pooled and stored and analytics are generated • Training in customer service skills, for example, learning the skills to better handle face to face customer interactions	

		• Training in the skills needed to manage an escalating situation and respond faster with valuable insights • Using and benefiting from case histories and prior successes to resolve open issues faster	
	Communications	**Advanced Communication Skills** • Learn the skills to leverage your customer information to build stronger customer relationships (meaningful conversation) • Determining and using your customer's preferred medium to keep the lines of communication open • Training on media skills to be able to use social media to address negative feedback and customer issues • Training on how to craft follow up messages that give you the information you need and the customer peace of mind • Develop the skill of detailed communications collection and sharing to enable multi-department customer support with common, shared information	
	Mobility	**Advanced Customer Service Mobile** • How to stay up to date on the road • Learn the correlation between responding to customers faster and increased customer satisfaction levels. Develop the skills to address and support issues for your customers quickly while out of the office • Learn the correlation between responding to customers faster and increased sales. Learn the skills to stay informed and keep selling while away from your desk • Develop the necessary skills and processes to ensure that after hours support is effective and valued so as to improve customer retention • Develop an understanding of security risks with mobile work and learn the necessary skills to ensure that company and customer information is secure in a mobile environment	
	Business Intelligence	**Advanced Business Intelligence** • Develop the skills to manage your company's and your personal key performance indicators • Grow your customer relationship management skills and knowledge • Understanding and interpreting analytics to make information driven decisions	

		• Learn the skills to leverage support cases, boost customer satisfaction and your skill set • Learning the importance of and the skills to utilize security structures to ensure information privacy • Empower your team with personalized reporting tools for their individual roles, targets, task lists, and customers • Training on information sharing skills	

Sessions: 10+

Frequency: Twice a week recommended

Hours: 20+

Instructors: Jacob Steinfeld, Ed Michitsch, Das Karia

Course Capacity: 1-12 attendees recommended

Cost: $225-275/hr. Prices are subject to change.