



Customer Relationship Management (CRM)

This Customer Relationship Management one to two day course challenges delegates to address these issues in a practical way that clarifies the relationship between customer care and overall business strategy.

Having successfully completed this course, participants should be able to:

- Develop an understanding of the benefits of CRM on a company's bottom line
- Analyse 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
- Appreciate different approaches to CRM that are best suited to the customer's culture

Customer Relationship Management – Consolidated Overview:

- Customer expectations
- Characteristics of CRM
- Successful and effective CRM people
- Benefits of effective CRM
- Managing customers
 - 10 things you need to know about customers
- Building relationships
 - Under promise over deliver
- Managing customer expectations
- SMART Standard
 - Specific
 - Measurable
 - Agreed
 - Realistic
 - Time bound
- Levels of communication
- Customer retention versus business attraction
 - 10 tips for long customer retention
- Customer loyalty
- Understand the reasons for losing customers
- Getting to the decision maker
- Negotiation techniques
 - When not to negotiate

Establishing a relationship

A. Prepare for the relationship

- Importance of gathering information about client prior to first visit
- Areas of importance to understand about the client

- Methods of obtaining information about the client

B. Learn about the customer

- Importance of understanding the business person
- A client's need for respect
- A client's need for control

C. Understand your value

- Understanding your value to the client
- Identifying opportunities for growth
- Sharing information about yourself with the client

D. Enter into a partnership

- Establishing trust and mutual understanding
- Indicators of effective relationships

Reaching agreement

A. Understand your client's perspective

- Determining client perception (beliefs and feelings) about the current situation
- Relationship of perception of the current situation to actual facts
- Determining client beliefs, feelings, and wishes about the future
- Clarifying client goals (versus wishes)
- Asking effective questions

B. Understand your own perspective

- Clarifying your own perspective about the current situation and the future
- Identifying differences between your perspective and the client's
- Challenging your own beliefs, feelings and wishes
- Clarifying your own goals

C. Identify common ground

- Importance of mutual commitment
- Agreeing to disagree
- Maintaining mutual respect when disagreeing
- Identifying common ground by examining underlying beliefs and feelings

Planning for results

A. Assess readiness for change

- Importance of change
- Consultant as change agent
- Barriers to change
- Readiness for change
- Vision, motivation, and capability

B. Facilitate planning

- Planning as an everyday, ongoing activity
- Psychological and practical barriers to planning
- Eliminating planning barriers
- Plans as leverage for change
- Anticipating long-term consequences and challenges

C. Clarify roles and responsibilities

- Taking control versus providing support

- Understanding individual stylistic preferences in consulting relationships
- Adjusting your style to fit the situation
- Accountability and responsibility

Providing support

A. Anticipate problems

- Underlying assumptions about problems being addressed
- Unanticipated changes in the environment
- Current and future processes
- Coordination and communication
- Unanticipated impact

B. Support client decisions

- Clarifying the decision
- Identifying the right questions to ask
- Identifying/selecting sources of information
- Collecting/analyzing the information
- Making a decision and following-up the decision

C. Provide constructive feedback

- Importance of a trusting relationship
- Recognition of client's need for respect and control
- Focus on mutual goals and emphasis on the future
- Assuming the client's perspective

Assessing the relationship

A. Solicit feedback

- Importance of customer feedback
- Overcoming barriers to soliciting feedback
- Obtaining and providing honest feedback
- Accepting compliments and criticism

B. Plan next steps

- Keeping the client relationship at the forefront
- Continuous assessment at each phase of the relationship

C. Recognise accomplishments

- Recognition and Celebration