



***Derek Hendrikz Consulting Presents:***

# **Customer Relationship Management (CRM)**

## **About the workshop:**

The Customer Relationship Management Training Programme is designed to give participants the necessary CRM skills to manage relationships in such a way that optimal customer satisfaction is achieved. Both strategic CRM and operational customer satisfaction are covered during the programme. Presented by Derek hendrikz Consulting.

## **The Workshop Mission:**

On completion of this workshop the participant should be able to effectively establish and manage customer relationships with a wide range of customers.

## **Workshop Objectives:**




The workshop mission is achieved through proving competence in the following objectives:

1. To understand and define the concept of CRM.
2. To increase the corporate and liaison networking skills of every participant.
3. To establish superior interpersonal relationships with customers.
4. To create superior customer satisfaction and value for the customer.
5. To contribute meaningfully towards strategic CRM.

## **Training methodology:**

The methodology is based on interactive learning, i.e. learners will learn by doing. Furthermore learners will use examples from their own organisations, thus ensuring that the learning is anchored at their workplace. Role plays and interactive experiential sessions will ensure that the learning stays anchored back at the workplace. As with all DHC training programmes, we strive to effect actual change back at the workplace through effective and practical outcomes based training.

## **Who Should Attend?**

-  Customer Service Employees & Business owners
-  CRM Managers, Customer Service Managers, Sales Managers...
-  Any person interested in supervising effective customer service practice.

**Programme:**

<b>Time:</b>	<b><u>Day 1:</u> The Essence of Customer Management...</b>	<b><u>Day 2:</u> Customer Relationship Development...</b>	<b><u>Day 3:</u> Frontline Customer Service...</b>
08:00-08:30	Administrative Matters	Open Window	Open Window
08:30-10:00	Introduction to Customer Management	Assessing Customer Loyalty	Becoming customer driven
10:00-10:15	<i>Convenience Break</i>		
10:15-11:45	Understanding the Customer Management Process	The Customer Value Proposition	Assessing & Responding to Customer Needs
11:45-12:45	<i>Lunch</i>		
12:45-14:15	Defining & Segmenting Your Customers	Liaison & Networking Skills	Interpersonal communication with customers
14:15-14:30	<i>Convenience Break</i>		
14:30-16:00	Customer Analysis	Effective Negotiation Skills in Customer Management	Programme Review & Evaluation

**Day 1:*****Introduction to Customer Relationship Management***

In this session the various facets of CRM are introduced and interactively discussed. The four main areas covered here are:

- Strategic CRM. This will entail the thinking behind all organisational CRM initiatives, the models used; the processes opted for, etc.
- Operational CRM. This is where rubber meets road. Here we explore the most effective way of taking action. Action plans, projects, systems and processes are worked with.
- Analytical CRM. This is the component where the organisation attempts to understand the effects and results of their CRM initiatives. Mostly CRM analysis will entail the translation of effects and results to measurable quantities and the making sense of such numbers once they are known.
- Customer satisfaction loyalty. Here we investigate the most effective ways of understanding customer satisfaction and loyalty. Both quantitative and qualitative techniques are investigated here.

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### ***Understanding the customer management process***

In this session the customer management process is unpacked in detail...

- Organisational strategy and its impact on the customer management process
- The process of customer attraction
- The process of customer acquisition
- The process of customer retention
- The process of creating the customer value proposition (CVP)

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### ***Defining & segmenting your customers***

- Linking organisational strategic and performance objectives to customer management outcomes
- Understanding the rules of segmentation
- Market selection, profile design and product / profile mapping
- Translating profiling variables to the CRM database

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### ***Customer analysis***

- Market share analysis
- Customer management performance analysis
- Customer relationship / profitability ratio
- Customer acquisition / retention ratio
- Customer value / CRM Ability ratio

## **Day 2:**

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### ***Assessing customer loyalty***

- Product loyalty
- Brand loyalty
- Company loyalty
- Surveys, complaint forums, etc...

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### ***The Customer Value Proposition***

Value is what customers pay for. What are you offering your customers? Below is a list of the value propositions that we have in exchange for the customer's sponsorship. We will first learn to understand them and then to apply them:

- Product & Services value.
- Process & Results value.
- People value.
- Communication value.
- Experience value.

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### ***Corporate liaison & networking skills***

This section entails the knowledge and skill necessary to establish a communication and feedback loop with all business stakeholders. Winning trust through the protection of your customers privacy, managing and keeping your networks relevant, liaison techniques that will ensure quick resolution and supplier management techniques and strategies that will ensure a low risk supply chain within the organisation. The main headings for this section are:

- Customer privacy.
- Networking management.
- Corporate liaison skills.
- Supplier relationships.

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### ***Effective negotiation skills in customer management***

It is internationally agreed that negotiation is the number one skill needed in sales, management and customer relations. All contact with customers entails some form of negotiation. Reality is that we are constantly negotiating our relationship with our customers. Below are a few headings that will enable you to enhance your negotiation tactics within the art of CRM practice.

- The art and science of 'closing'.
- Defining your 'closing' purpose and objectives.
- Negotiating the long term relationship.
- Negotiating the customer value proposition.

## **Day 3:**

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### ***Becoming customer driven***

Satisfied customers are customers who come back. Customer satisfaction is mostly a result derived from a myriad of processes within the field of CRM. We use this session to discuss and internalise the essence of creating customer satisfaction through becoming customer driven.

- Understanding what customers want.
- Creating a constant feedback loop.
- Redesigning processes to avoid what customers don't want.

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### ***Assessing and responding to customer needs***

Your customer is always right – provided that their claim to your attention is within the negotiated boundaries! The reality is that without clearly defined boundaries, CRM becomes a nightmare.... to the extent where you might even be spending a significant amount of time on things which are not even remotely within your delivery agreement. First we have to understand precisely who our customers are; secondly we have to understand the boundary contract which exists between us, and then only will we be in a position to manage significant customer portfolios.

- The boundaries of responsibility.
- Customer portfolio management & strategically significant customers.

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### *Interpersonal communication with customers*

Here we address what is mostly known as behavioural CRM or front-desk customer service. Without simple courtesy, manners and customer empathy, all our processes and strategies would be quite meaningless.

- Person to person contact. This is the moment of truth! Where customer meets front-desk is where organisation makes or breaks impression. Most customers decide to continue or discontinue interaction with your organisation at the front desk.
- Key account management. Learning to accurately segment and interact with your customers is a skill often misunderstood in CRM and related departments. No all customers hold the same value to your business and therefore not all customers should be treated in the same way.
- Interpersonal effectiveness. Here we work with the soft skills that will get you everywhere....
- Customer conflict management. Admittedly, there are the customers who drive our patience through the wall... But they stay our customers and we have to learn how to work with them. If skilled enough we can event turn our most difficult customers into our most valuable assets...

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**Beyond Comparison!**