

WORKSHOP 2 – CUSTOMER RELATIONSHIP MANAGEMENT (5 DAYS)

OBJECTIVE: To provide participants with an understanding of how customer relationship management (CRM) concepts and techniques can be applied within a financial services environment in order to achieve relevant personal or organisational sales and marketing objectives.

OUTCOMES: On completion of the programme participants will understand the nature and importance of customer relationship management and will be able to apply a range of CRM concepts and techniques in a financial services environment.

TARGET AUDIENCE: All staff involved in customer relationship management, all staff involved selling and marketing bank products and services and staff involved in customer service or customer care.

CONTENTS

Day 1

Session 1 – Principles of Customer Relationship Management (CRM)

Session 2 – Know your customer

Day 2

Session 1 – Customer care

Session 2 – Relationship building

Day 3

Session 1 – Measuring service quality

Session 2 – Continuous improvement in service quality

Day 4

Session 1 – Market segmentation & branding

Session 2 – Establishing and monitoring service standards

Day 5

Session 1 – Planning & communications

Session 2 - Delegate presentations & review

DELIVERY: The programme will be conducted in English and will incorporate group work, case studies and delegate presentations.

DURATION: 30 hours

For more information or for alternative courses contact:

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