



Consulting and Training | Reach New Heights

Course Name

Client Relationship Management (CRM)

Sector Name

Sales, Marketing and Customer Service

Document Type

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Client Relationship Management (CRM)

Course Introduction

Client relationship management plays a vital role in the success of any business. This helps a business to recognize the value of its clients and to capitalize on improved client relations. Having a better understanding of the client's purchasing habits, opinions, and preferences, the more a business can respond to address their needs.

This training program is designed to enable participants to enhance their ability to manage client relationships by understanding and implementing the latest CRM strategies and tools, developing their analytical skills, plus enhancing their ability to build an integrated client-focused culture and Measure client satisfaction to boost the organization's sales outcomes.

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Client Relationship Management (CRM)

Target Audience

- ✓ Business Development Executives
- ✓ Sales / Marketing Managers
- ✓ Account Managers / Relationship Managers
- ✓ Sales Directors

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Client Relationship Management (CRM)

Learning Objectives

- ✓ Understand the concept and functions of client relationship management (CRM).
- ✓ Understand the importance of CRM in promoting the organization's sales and marketing targets.
- ✓ Identify CRM tools and solutions.
- ✓ Understand and apply CRM planning strategies.
- ✓ Master analyzing the provided product/service and the business situation.
- ✓ Master Analyzing client characteristics and expectations.
- ✓ Understand and apply Client journey planning strategies.
- ✓ Develop an integrated Information system to facilitate communication with clients.
- ✓ Create a strong CRM vision and goals.
- ✓ Develop the CRM Team.
- ✓ Master Developing a client-focused culture.
- ✓ Define the most common mistakes when using CRM.
- ✓ Measure client satisfaction with the provided service.
- ✓ Develop performance indicators to measure client service in the organization.

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Client Relationship Management (CRM)

Course Outline

✓ DAY 01

Introduction to Client Relationship Management (CRM)

- ✓ The concept of client relationship management (CRM).
- ✓ The importance of CRM in promoting the organization's sales and marketing targets.
- ✓ Client relationship management functions.
- ✓ Understanding the relationship between the client and the organization.
- ✓ The difference between a traditional and holistic focus in CRM.
- ✓ Overview: CRM tools and solutions.

Effective Planning for CRM

- ✓ CRM planning strategies.
- ✓ Analyze the provided product/service (Best strategies and Practices)
- ✓ Determine the strengths and weaknesses of the provided product/service.
- ✓ Business situation analysis.
- ✓ Analyze client characteristics and expectations.
- ✓ Identify your Ideal Client.
- ✓ Planning for Client Interactions.
- ✓ Client journey planning strategies.

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Client Relationship Management (CRM)

Course Outline

✓ Day 02

How to Implement CRM?

- ✓ Creating a strong CRM vision and goals.
- ✓ Develop the CRM Team.
- ✓ Choose the right CRM Solution.
- ✓ Identify Technology requirements.
- ✓ Develop an integrated Information system to facilitate communication with clients.
- ✓ Your guide to managing user security.
- ✓ Identify risks.
- ✓ Developing a client-focused culture.
- ✓ Manage change to adopt CRM.
- ✓ Develop the organization's strategy for the CRM.
- ✓ Double the added value.
- ✓ How to manage Continuing requirements?
- ✓ Define your mistakes when using CRM.
- ✓ Practical Application.

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Client Relationship Management (CRM)

Course Outline

✓ Day 03

Achieving client satisfaction:

- ✓ Measuring client satisfaction with the provided service.
- ✓ Client satisfaction model.
- ✓ Obstacles to obtaining client satisfaction.
- ✓ Client desired value model.
- ✓ Develop feedback channels.
- ✓ Client service automation.
- ✓ Develop performance indicators to measure client service in the organization.
- ✓ Strategies to enhance the performance of the client service team.

Action Plan

- ✓ At the end of the training, participants will be asked to develop a CRM plan relating to the department/industry they belong to. The presentation should include the details such as the profile of target clients, the strategies to be implemented, and how to measure the effectiveness of the plan. This will be presented to the class for discussion.

Client Relationship Management (CRM)

Confirmed Sessions

FROM	TO	DURATION	FEES	LOCATION
Dec. 14, 2026	Dec. 16, 2026	3 days	3950.00 \$	Austria , Vienna
Jan. 24, 2027	Jan. 26, 2027	3 days	3250.00 \$	KSA , Jeddah
Sept. 28, 2026	Sept. 30, 2026	3 days	3250.00 \$	UAE , Dubai
April 12, 2027	April 14, 2027	3 days	3250.00 \$	UAE , Dubai

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