A. Course Name: Mastering CRM: Strategies, Implementation, and Future Trends

1. **Introduction to CRM: 5%**
2. **Key Components of CRM: 10%**
3. **Choosing the Right CRM Solution: 10%**
4. **Implementing CRM: 15%**
5. **CRM Best Practices: 15%**
6. **CRM Metrics and Analytics: 15%**
7. **Advanced CRM Features and Tools: 10%**
8. **Case Studies and Real-World Examples: 10%**
9. **CRM Security and Compliance: 5%**
10. **Future Trends in CRM: 5%**

B. Course Outline:

Module 1: Introduction to CRM

1.1 Understanding the Concept of CRM

- **CRM Definition and Scope**
    - Defining CRM and its significance in modern business operations.
    - Exploring the scope of CRM beyond customer data management to encompass sales, marketing, and customer service functions.
- **Evolution of CRM**
    - Tracing the historical development of CRM from traditional methods to modern, technology-driven solutions.
    - Examining key milestones and paradigm shifts in CRM adoption across industries and sectors.

1.2 Importance of CRM in Modern Business

- **Business Value Proposition**
    - Articulating the business benefits and competitive advantages of implementing CRM systems.

    - Illustrating real-world case studies and success stories of organizations that have achieved tangible results through CRM initiatives.

- **Impact on Customer Experience**
    - Analyzing the role of CRM in enhancing customer satisfaction, loyalty, and retention.
    - Demonstrating how personalized interactions and targeted marketing strategies can drive customer engagement and brand advocacy.

1.3 Benefits and Advantages of Implementing CRM

- **Operational Efficiency**
    - Discussing how CRM streamlines business processes, automates routine tasks, and improves workflow efficiency.
    - Highlighting the cost-saving benefits and productivity gains associated with CRM adoption.
- **Data-Driven Decision Making**
    - Emphasizing the role of CRM in providing actionable insights and data-driven intelligence for informed decision-making.
    - Exploring how analytics and reporting capabilities empower organizations to identify trends, anticipate customer needs, and capitalize on market opportunities.

Module 2: Key Components of CRM

2.1 Customer Data Management

- **Data Capture Techniques**
    - Exploring various data capture methods such as web forms, email subscriptions, and social media interactions.
    - Best practices for capturing accurate and relevant customer information.
- **Data Quality Assurance**
    - Techniques for ensuring data accuracy, consistency, and completeness.
    - Implementing validation rules and data cleansing procedures.
- **Data Segmentation and Personalization**
    - Strategies for segmenting customer data based on demographics, behavior, and preferences.
    - Leveraging segmentation for personalized marketing campaigns and targeted communication.

2.2 Sales Force Automation (SFA)

- **Lead Management Workflow**
  - Designing an effective lead management process from lead acquisition to qualification and conversion.
  - Implementing lead scoring models to prioritize high-quality leads.
- **Opportunity Management**
  - Understanding the sales pipeline stages and tracking opportunities through the sales funnel.
  - Techniques for forecasting sales revenue and managing sales quotas.
- **Integration with Sales Tools**
  - Integrating CRM with sales tools such as email clients, calendars, and document management systems for seamless workflow automation.

2.3 Marketing Automation

- **Email Marketing Campaigns**
  - Designing and executing targeted email campaigns using CRM marketing automation features.
  - A/B testing strategies for optimizing email subject lines, content, and timing.
- **Lead Nurturing Strategies**
  - Creating automated lead nurturing workflows to engage prospects at different stages of the buyer's journey.
  - Using dynamic content and personalized messaging to nurture leads towards conversion.
- **Measuring Marketing ROI**
  - Tracking key metrics such as conversion rates, click-through rates, and ROI to evaluate the effectiveness of marketing campaigns.
  - Utilizing marketing analytics to identify trends and optimize marketing strategies.

2.4 Customer Service and Support

- **Ticketing and Case Management**
  - Setting up a ticketing system to track and manage customer inquiries, issues, and requests.
  - Implementing case escalation processes to ensure timely resolution of customer issues.
- **Knowledge Management**

    - Building a centralized knowledge base of frequently asked questions, troubleshooting guides, and product documentation.
    - Enabling self-service support options for customers to find solutions independently.
- **Service Level Agreement (SLA) Management**
    - Defining SLA parameters such as response time, resolution time, and service quality standards.
    - Monitoring SLA compliance and implementing corrective actions to address service level deviations.

2.5 Analytics and Reporting

- **Descriptive Analytics**
    - Generating standard reports and dashboards to visualize key CRM metrics such as sales performance, customer engagement, and pipeline health.
    - Exploring data trends and patterns to gain actionable insights into customer behavior and market trends.
- **Diagnostic Analytics**
    - Analyzing root causes of performance issues or discrepancies identified through descriptive analytics.
    - Conducting ad-hoc data analysis to investigate specific business questions or hypotheses.
- **Predictive Analytics**
    - Leveraging predictive modeling techniques to forecast future customer behavior, sales trends, and market demand.
    - Implementing predictive lead scoring models to prioritize sales opportunities based on their likelihood to convert

Module 3: Choosing the Right CRM Solution

3.1 Factors to Consider When Selecting a CRM System

- **Business Requirements Analysis**
    - Conducting a comprehensive assessment of organizational needs, goals, and pain points to define CRM requirements.
    - Prioritizing feature requirements based on business priorities, user preferences, and technical constraints.
- **Scalability and Flexibility**

    - Evaluating CRM solutions based on their scalability, flexibility, and adaptability to accommodate future growth and changing business dynamics.
    - Assessing scalability options such as cloud-based deployment, modular architecture, and integration capabilities.

3.2 Types of CRM Systems

- **On-Premise vs. Cloud-Based CRM**
    - Contrasting on-premise and cloud-based CRM deployment models in terms of cost, security, accessibility, and scalability.
    - Analyzing the pros and cons of each deployment option and identifying the best fit for organizational requirements and preferences.
- **Open Source vs. Proprietary CRM**
    - Comparing open-source and proprietary CRM software solutions in terms of cost, customization, community support, and vendor lock-in risks.
    - Exploring popular open-source CRM platforms and their features, such as SugarCRM, SuiteCRM, and vTiger CRM.

3.3 Popular CRM Platforms Comparison

- **Salesforce**
    - Providing an overview of Salesforce CRM features, modules, and editions tailored to different business sizes and industries.
    - Highlighting key functionalities such as lead management, opportunity tracking, forecasting, and integration with third-party applications.
- **HubSpot**
    - Exploring HubSpot CRM's inbound marketing approach, including lead generation, email marketing, social media integration, and marketing automation features.
    - Discussing HubSpot's free CRM offering and its integration with other HubSpot products for comprehensive inbound marketing and sales solutions.
- **Zoho CRM**
    - Reviewing Zoho CRM's suite of sales, marketing, and customer support tools designed for small and medium-sized businesses (SMBs).
    - Discussing Zoho CRM's customization options, workflow automation capabilities, and integration with Zoho's ecosystem of business applications.

Module 4: Implementing CRM

4.1 Planning the Implementation Process

- **Needs Assessment and Goal Setting**
    - Conducting stakeholder interviews and workshops to gather requirements, define objectives, and align CRM implementation goals with organizational strategy.
    - Developing a project roadmap and timeline with clear milestones, deliverables, and resource allocations.

4.2 Data Migration Strategies

- **Data Assessment and Cleansing**
    - Assessing the quality, completeness, and consistency of existing data to identify data cleansing and normalization requirements.
    - Developing data migration plans and strategies to ensure smooth transition and data integrity during CRM implementation.

4.3 Integration with Existing Systems

- **System Integration Planning**
    - Identifying integration points and dependencies between CRM and other enterprise systems such as ERP, marketing automation, and customer support platforms.
    - Developing integration architectures, data mapping schemas, and API specifications to facilitate seamless data exchange and interoperability.

4.4 Training and Change Management

- **End-User Training Programs**
    - Designing customized training programs and materials tailored to different user roles, skill levels, and learning styles.
    - Conducting hands-on workshops, online tutorials, and knowledge transfer sessions to familiarize users with CRM features, workflows, and best practices.

Module 5: CRM Best Practices

5.1 Building and Maintaining a Clean Customer Database

- **Data Governance Policies**
    - Establishing data governance policies, procedures, and standards to ensure data quality, consistency, and compliance with regulatory requirements.
    - Implementing data validation rules, de-duplication routines, and data cleansing workflows to maintain a clean and accurate customer database.

5.2 Effective Lead Management Strategies

- **Lead Qualification Criteria**
  - Defining lead scoring models and qualification criteria based on demographic, firmographic, and behavioral attributes to prioritize leads for sales engagement.
  - Implementing lead routing rules and assignment workflows to route qualified leads to the appropriate sales representatives in a timely manner.

5.3 Personalization and Segmentation Techniques

- **Segmentation Strategies**
  - Segmenting customer data based on demographic, geographic, psychographic, and behavioral characteristics to tailor marketing messages and offers to specific audience segments.
  - Leveraging dynamic content, personalization tokens, and behavioral triggers to deliver personalized experiences across multiple channels and touchpoints.

5.4 Automating Repetitive Tasks

- **Workflow Automation**
  - Identifying repetitive tasks and manual processes that can be automated using CRM workflow automation tools and features.
  - Designing automated workflows, triggers, and alerts to streamline routine tasks, reduce manual effort, and improve operational efficiency.

5.5 Customer Retention Strategies

- **Customer Feedback and Satisfaction Monitoring**
  - Implementing customer feedback mechanisms such as surveys, feedback forms, and Net Promoter Score (NPS) surveys to measure customer satisfaction and loyalty.
  - Analyzing customer feedback data to identify areas for improvement, address customer concerns, and proactively prevent churn.

Module 6: CRM Metrics and Analytics

6.1 Key Performance Indicators (KPIs) for CRM

- **Sales Performance Metrics**
  - Tracking KPIs such as sales revenue, win rate, average deal size, and sales velocity to measure sales team performance and effectiveness.
  - Analyzing sales pipeline metrics such as pipeline value, stage conversion rates, and time-to-close to identify bottlenecks and optimize sales processes.

6.2 Analyzing Sales Pipeline and Forecasting

- **Pipeline Analysis Techniques**
    - Analyzing sales pipeline data to identify opportunities, assess pipeline health, and forecast future sales revenue.
    - Implementing pipeline visualization tools, reports, and dashboards to monitor pipeline trends, identify risks, and prioritize sales activities.

6.3 Customer Lifetime Value (CLV) Calculation

- **CLV Calculation Models**
    - Understanding different CLV calculation models such as historic CLV, predictive CLV, and cohort analysis.
    - Leveraging CLV insights to segment customers, personalize marketing efforts, and optimize customer acquisition and retention strategies.

6.4 Measuring Customer Satisfaction and Loyalty

- **Customer Satisfaction Metrics**
    - Utilizing metrics such as customer satisfaction score (CSAT), customer effort score (CES), and customer retention rate (CRR) to measure overall customer satisfaction and loyalty.
    - Analyzing customer feedback, testimonials, and online reviews to gauge sentiment and identify areas for improvement.

Module 7: Advanced CRM Features and Tools

7.1 AI and Machine Learning in CRM

- **Natural Language Processing (NLP)**
    - Implementing chatbots and virtual assistants powered by NLP to automate customer interactions and provide personalized assistance.
    - Analyzing unstructured data sources such as emails, social media posts, and customer reviews using NLP techniques.
- **Predictive Analytics Models**
    - Building predictive models for churn prediction, cross-selling, and upselling based on historical customer data.
    - Integrating predictive analytics insights into CRM workflows to drive proactive decision-making and targeted marketing campaigns.
- **Sentiment Analysis**

    - Using sentiment analysis algorithms to analyze customer sentiment expressed in text-based interactions and social media conversations.
    - Identifying trends and patterns in customer sentiment to improve product offerings, customer service strategies, and brand reputation management.

7.2 Social CRM and Social Media Integration

- **Social Listening and Monitoring**
    - Implementing social listening tools to monitor brand mentions, customer conversations, and industry trends across social media platforms.
    - Extracting actionable insights from social media data to inform marketing strategies, product development initiatives, and customer engagement efforts.
- **Social Media Engagement**
    - Engaging with customers directly on social media platforms through comments, messages, and posts to build relationships and foster brand loyalty.
    - Leveraging social media channels as customer service touchpoints to address inquiries, resolve issues, and provide timely support.

7.3 Mobile CRM Applications

- **Mobile App Design Principles**
    - Designing intuitive and user-friendly mobile CRM applications optimized for various devices and screen sizes.
    - Incorporating mobile-first design principles to enhance usability and accessibility for on-the-go users.
- **Offline Access and Synchronization**
    - Implementing offline access capabilities in mobile CRM apps to enable users to access and modify data even without an internet connection.
    - Synchronizing data between mobile devices and the central CRM system to ensure data consistency and integrity.

7.4 Workflow Automation and Advanced Customization

- **Workflow Automation Rules**
    - Configuring workflow automation rules to automate repetitive tasks, streamline business processes, and enforce standard operating procedures.
    - Defining trigger conditions, actions, and approval processes for automated workflows based on specific business rules and requirements.
- **Customization Options**

- Customizing CRM modules, fields, layouts, and views to align with unique business needs, industry-specific requirements, and user preferences.
- Implementing custom reports, dashboards, and analytics to provide tailored insights and actionable intelligence for different stakeholders.

Module 8: Case Studies and Real-World Examples

8.1 Success Stories of Companies Implementing CRM Effectively

- **Case Studies Across Industries**
  - Examining case studies of companies from various industries that have successfully implemented CRM systems to achieve business objectives.
  - Analyzing key success factors, challenges overcome, and lessons learned from real-world CRM implementations.

8.2 Challenges Faced and Lessons Learned

- **Common Challenges in CRM Implementations**
  - Identifying common pitfalls and challenges encountered during CRM implementation projects, such as data migration issues, user adoption barriers, and integration complexities.
  - Discussing strategies for overcoming challenges, mitigating risks, and ensuring successful CRM deployments.

8.3 Practical Demonstrations of CRM Usage

- **Live Demos and Use Cases**
  - Providing practical demonstrations of CRM features, functionalities, and best practices through live simulations and use cases.
  - Engaging participants in interactive exercises, role-playing scenarios, and hands-on activities to reinforce learning and application of CRM concepts

Module 9: CRM Security and Compliance

9.1 Data Security Best Practices

- **Data Encryption Techniques**
  - Implementing encryption algorithms and protocols to secure sensitive customer data both at rest and in transit.
  - Utilizing encryption key management systems to control access to encrypted data and protect against unauthorized access.

- **Data Masking and Anonymization**
    - Applying data masking and anonymization techniques to protect personally identifiable information (PII) and sensitive business data from exposure or misuse.
    - Redacting or obfuscating sensitive data elements in CRM reports, dashboards, and user interfaces to comply with data privacy regulations.

9.2 GDPR and Other Data Protection Regulations

- **GDPR Compliance Framework**
    - Understanding the key principles and requirements of the General Data Protection Regulation (GDPR) and its implications for CRM systems and practices.
    - Developing GDPR compliance strategies, policies, and procedures to ensure lawful and ethical handling of customer data.
- **Data Subject Rights Management**
    - Enabling mechanisms for data subjects to exercise their rights under GDPR, including the rights to access, rectify, erase, and port their personal data.
    - Establishing processes for managing data subject requests, verifying identities, and responding to inquiries in a timely manner.

9.3 Managing User Permissions and Data Encryption

- **Role-Based Access Control (RBAC)**
    - Implementing RBAC policies to assign granular access permissions and privileges to CRM users based on their roles, responsibilities, and organizational hierarchy.
    - Enforcing least privilege principles to restrict access to sensitive data and functionalities only to authorized users with a legitimate business need.
- **Data Encryption and Tokenization**
    - Employing data encryption and tokenization techniques to protect sensitive data fields such as passwords, credit card numbers, and social security numbers from unauthorized access or disclosure.
    - Integrating encryption and tokenization solutions with CRM platforms to ensure end-to-end data security and compliance with regulatory requirements.

Module 10: Future Trends in CRM

10.1 Emerging Technologies Shaping the Future of CRM

- **AI and Machine Learning**

    - Exploring the role of artificial intelligence (AI) and machine learning (ML) in driving innovation and transformation in CRM.
    - Discussing AI-powered applications such as predictive analytics, conversational AI, and virtual assistants in CRM.

10.2 Predictive Analytics and AI-Driven Insights

- **Predictive Analytics Models**
    - Discussing the application of predictive analytics models in CRM for forecasting sales trends, predicting customer behavior, and optimizing marketing campaigns.
    - Exploring advanced machine learning techniques such as neural networks, decision trees, and ensemble methods for predictive modeling in CRM.

10.3 Omni-Channel Customer Experience

- **Multi-Channel Engagement Strategies**
    - Understanding the importance of delivering seamless and consistent customer experiences across multiple channels and touchpoints.
    - Exploring omni-channel CRM strategies that integrate customer interactions across web, mobile, social media, email, and offline channels.

10.4 Personalized and Hyper-Targeted Marketing Approaches

- **Personalization Techniques**
    - Leveraging customer data, behavioral insights, and predictive analytics to deliver personalized marketing messages, product recommendations, and offers.
    - Implementing hyper-targeted marketing campaigns based on individual preferences, purchase history, and browsing behavior to maximize engagement and conversion rates.

C. Requirements:

1. Commitment to Participation:

- Participants must commit to actively contributing to the development of the CRM course.

- Participants should be willing to select specific modules to work on and adhere to agreed timelines.

2. Skillset:

- Participants should have relevant skills and expertise in areas such as CRM, digital marketing, data analysis, instructional design, content creation, and video production.

- Participants should be capable of producing high-quality educational content in their chosen module(s).

3. Access to Tools and Resources:

- Participants should have access to necessary tools and resources for content creation, such as presentation software, video editing software, code editors, etc:

For example:

- ClipChamp – Video Creator
- Power Point / Canvas
- Required software, Code, …

- Access to relevant CRM platforms or software for demonstration purposes is beneficial.

4. Commitment to Collaboration:

- Participants must actively engage in collaborative discussions and decision-making within the Zalo group.

- Participants should be open to feedback, suggestions, and contributions from other participants.

5.Deliverables:

1. Slide Deck:

- Participants are required to create a comprehensive slide deck for their chosen module(s) following the provided course outline.

- Slides should be visually appealing, well-organized, and include relevant content, graphics, and examples.

2. Transcript:

- A detailed transcript of the presentation should be provided along with the slide deck. It is either English and/or Vietnamese (prefer English and along another Vietnamese version) – Use Generative AI to support this point.

- The transcript should include thorough explanations of each slide's content, ensuring clarity and understanding for learners.

3. Code (if applicable):

- For modules that involve technical demonstrations or examples, participants should provide sample code snippets, scripts, or configurations.

- Code should be well-commented and annotated to explain its purpose and functionality.

4. Demo (if applicable):

- Participants may include live demonstrations or simulations of CRM features, workflows, or processes.

- Demos should be recorded and integrated into the presentation or provided as separate video files.

5. Video Presentation:

- Participants are required to record a video presentation of their module(s) using screen recording software or video editing tools.

- The video should cover the content of the slide deck, providing additional context, insights, and explanations.

- Videos should be engaging, well-paced, and professionally presented.

6. Commitment Timeline:

- Participants must provide a timeline outlining their planned milestones, including deadlines for completing each deliverable.

- Participants should commit to adhering to the agreed-upon timeline and communicate any delays or challenges promptly.

Collaboration and Tracking:

1. Zalo Group Formation:

- A dedicated Zalo group will be formed for participants to collaborate, discuss, and track progress on a weekly basis.

- Participants are expected to actively engage in group discussions, provide updates, and seek assistance or feedback as needed.

2. Weekly Progress Tracking:

- Weekly progress updates should be shared within the Zalo group, outlining achievements, challenges, and next steps.

- Participants should communicate any issues or concerns promptly to ensure timely resolution and course development.

D. Compensation:

Please refer to the compensation policy on Educonnhub.com