
Customer Relationship Management

National Competency Standard (BSB07)
BSBREL402A Build client relationships and business networks



Aim

This course provides participants with strategies for establishing, maintaining and improving client relationships to support attainment of key business outcomes.

Audience

The audience for this course is anyone who is responsible for establishing and building client relationships, and is looking for ways to set their firm apart from others and enhance their image in the eyes of clients.

Duration

One day.

Course Outcomes

1. Initiate communication with clients.
2. Establish rapport with clients using verbal and non-verbal communication.
3. Identify potential barriers to communication.
4. Determine client needs, preferences and expectations.
5. Establish client relationship management strategies.
6. Maintain and improve ongoing relationships with clients.

Optional Assessment

This is a nationally recognised training program. Participants who successfully complete the optional assessment component of this course will receive a Statement of Attainment for the unit of competency outlined above. The assessment comprises a case study assignment designed to demonstrate competence. Participants who choose not to be assessed will receive a Certificate of Attendance. The case study assignment is completed in the participant's own time.

Course Content

About this course

Overview of CRM

- Relationship marketing
- Customer life cycle
- Loyalty life cycle
- CRM cycle
- CRM technology
- Customer databases
- The Web
- Components of CRM
- Communications strategy
- Tactical invasion

Communicating with clients

- Communication styles and methods
- Verbal and non-verbal communication
- Active listening techniques

- Written communication
- Develop a communications strategy
- Client needs, preferences and expectations
- Exceeding client expectations
- Keeping client records

Client relationship strategies

- Strategic partnerships
- Client loyalty strategies
- Managing existing client relationships
- Maintain ongoing client relationships
- Referral processes

Keeping the Client

- Establishing feedback processes
- Monitoring client satisfaction
- Using feedback to improve relationships