

MARKETING & COMMUNICATION | COURSE BROCHURE

Customer Relationship Management (CRM) and Customer Retention

5 days | Classroom training | English

SMART HORIZON

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2 Kingdom Street, Paddington
London W2 6BD, United Kingdom

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https://smarthorizon.uk



Course content

Why attend

Acquiring new customers costs significantly more than keeping existing ones. This course shows marketing, sales and service professionals how to use customer relationship management strategies, data and technology to improve retention, increase customer lifetime value and deliver more personalised experiences. Participants learn customer segmentation, lifecycle marketing, loyalty design, churn analysis, CRM system use and measurement of customer value, and they develop a retention strategy for their own organisation.

Many organisations invest in CRM software without changing how they manage customer relationships. This course focuses on the strategy, processes and analytics that make CRM effective, helping you keep valuable customers longer and grow revenue from your existing base.

Professional Problems This Course Is Designed to Solve

• Difficulty translating subject knowledge into practical workplace decisions.
• Inconsistent approaches to the activities covered in the course outline.
• Lack of a structured plan for applying and reviewing new skills.

Course methodology

The programme uses case studies, segmentation and churn analysis exercises, customer journey workshops, CRM demonstrations and development of a retention plan.

Course objectives

By the end of this course, participants will be able to:
• Explain CRM strategy and its role in customer retention
• Segment customers by value, needs and behaviour
• Design lifecycle and retention programmes
• Analyse churn and customer lifetime value
• Use CRM systems and data to personalise engagement
• Measure and improve retention performance



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Target audience

This course is suitable for:

- Marketing and CRM managers
- Sales managers and account managers
- Customer service and customer success leaders
- Business development professionals
- Digital marketing and analytics specialists

Target competencies

Participants will develop competencies in:

- CRM strategy
- Customer segmentation
- Lifecycle marketing
- Churn analysis
- Loyalty programme design
- Customer lifetime value

Course outline

Day 1: CRM Strategy and Customer Value

09:00–09:54	What CRM really means: strategy, process and technology
09:54–10:48	The economics of retention and customer lifetime value
10:48–11:00	Customer-centric organisations
11:00–11:30	**Coffee break**
11:30–12:12	Customer-centric organisations (continued)
12:12–13:06	Assessing CRM maturity
13:06–14:00	Exercise: Calculating customer lifetime value

Day 2: Understanding and Segmenting Customers

09:00–09:54	Customer data sources and single customer view
09:54–10:48	Value-based and needs-based segmentation
10:48–11:00	Behavioural and RFM analysis



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11:00–11:30	**Coffee break**
11:30–12:12	Behavioural and RFM analysis (continued)
12:12–13:06	Customer personas
13:06–14:00	Workshop: Segmenting a customer base

Day 3: Lifecycle and Retention Programmes

09:00–09:54	Onboarding, engagement and renewal journeys
09:54–10:48	Loyalty programmes and rewards
10:48–11:00	Personalisation and next-best-action
11:00–11:30	**Coffee break**
11:30–12:12	Personalisation and next-best-action (continued)
12:12–13:06	Win-back campaigns
13:06–14:00	Case study: A subscription business reducing churn

Day 4: CRM Systems and Analytics

09:00–09:54	Core CRM system capabilities
09:54–10:48	Sales, service and marketing automation
10:48–11:00	Churn prediction and early warning signals
11:00–11:30	**Coffee break**
11:30–12:12	Churn prediction and early warning signals (continued)
12:12–13:06	Dashboards and reporting
13:06–14:00	Demonstration: Using CRM data to target retention

Day 5: Measuring and Improving Retention

09:00–09:54	Retention, churn and satisfaction metrics
09:54–10:48	Customer feedback and voice of the customer
10:48–11:00	Aligning sales, marketing and service teams



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11:00–11:30	**Coffee break**
11:30–12:12	Aligning sales, marketing and service teams (continued)
12:12–13:06	Data protection and consent
13:06–14:00	Capstone: Customer retention strategy

The timings provided are estimates and may vary depending on the number of participants and the discussions taking place during the sessions. They are indicative only and do not constitute a binding commitment.

Dates, venues and fees

Current published course plans. Fees are per participant in GBP, excluding unconfirmed taxes.

Venue	Start date	End date	Fee (GBP)
Dubai Confirmed dates	16 Nov 2026	20 Nov 2026	**£3,150.–**
Online Confirmed dates	16 Nov 2026	20 Nov 2026	**£1,250.–**
Cape Town Confirmed dates	30 Nov 2026	4 Dec 2026	**£1,890.–**
Online Confirmed dates	30 Nov 2026	4 Dec 2026	**£1,250.–**
Frankfurt Confirmed dates	7 Dec 2026	11 Dec 2026	**£2,650.–**
Online Confirmed dates	7 Dec 2026	11 Dec 2026	**£1,250.–**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Kuala Lumpur Confirmed dates	14 Dec 2026	18 Dec 2026	**£1,450.-**
Online Confirmed dates	14 Dec 2026	18 Dec 2026	**£1,250.-**
Paris Confirmed dates	4 Jan 2027	8 Jan 2027	**£2,860.-**
Online Confirmed dates	4 Jan 2027	8 Jan 2027	**£1,250.-**
Istanbul Confirmed dates	18 Jan 2027	22 Jan 2027	**£2,650.-**
Online Confirmed dates	18 Jan 2027	22 Jan 2027	**£1,250.-**
Amsterdam Confirmed dates	1 Feb 2027	5 Feb 2027	**£2,540.-**
Online Confirmed dates	1 Feb 2027	5 Feb 2027	**£1,250.-**
Singapore Confirmed dates	15 Feb 2027	19 Feb 2027	**£2,820.-**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	15 Feb 2027	19 Feb 2027	**£1,250.–**
London Confirmed dates	1 Mar 2027	5 Mar 2027	**£2,450.–**
Online Confirmed dates	1 Mar 2027	5 Mar 2027	**£1,250.–**
Vienna Confirmed dates	8 Mar 2027	12 Mar 2027	**£2,940.–**
Online Confirmed dates	8 Mar 2027	12 Mar 2027	**£1,250.–**
Dubai Confirmed dates	15 Mar 2027	19 Mar 2027	**£3,150.–**
Online Confirmed dates	15 Mar 2027	19 Mar 2027	**£1,250.–**
Frankfurt Confirmed dates	5 Apr 2027	9 Apr 2027	**£2,650.–**
Online Confirmed dates	5 Apr 2027	9 Apr 2027	**£1,250.–**



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Dates, venues and fees (continued)

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Kuala Lumpur Confirmed dates	19 Apr 2027	23 Apr 2027	**£1,450.–**
Online Confirmed dates	19 Apr 2027	23 Apr 2027	**£1,250.–**
Paris Confirmed dates	3 May 2027	7 May 2027	**£2,860.–**
Online Confirmed dates	3 May 2027	7 May 2027	**£1,250.–**
Barcelona Confirmed dates	10 May 2027	14 May 2027	**£2,840.–**
Online Confirmed dates	10 May 2027	14 May 2027	**£1,250.–**
Istanbul Confirmed dates	17 May 2027	21 May 2027	**£2,650.–**
Online Confirmed dates	17 May 2027	21 May 2027	**£1,250.–**
Amsterdam Confirmed dates	7 Jun 2027	11 Jun 2027	**£2,540.–**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	7 Jun 2027	11 Jun 2027	**£1,250.–**
Singapore Confirmed dates	21 Jun 2027	25 Jun 2027	**£2,820.–**
Online Confirmed dates	21 Jun 2027	25 Jun 2027	**£1,250.–**
London Confirmed dates	5 Jul 2027	9 Jul 2027	**£2,450.–**
Online Confirmed dates	5 Jul 2027	9 Jul 2027	**£1,250.–**
Cape Town Confirmed dates	12 Jul 2027	16 Jul 2027	**£1,890.–**
Online Confirmed dates	12 Jul 2027	16 Jul 2027	**£1,250.–**
Dubai Confirmed dates	19 Jul 2027	23 Jul 2027	**£3,150.–**
Online Confirmed dates	19 Jul 2027	23 Jul 2027	**£1,250.–**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Frankfurt Confirmed dates	2 Aug 2027	6 Aug 2027	**£2,650.-**
Online Confirmed dates	2 Aug 2027	6 Aug 2027	**£1,250.-**
Kuala Lumpur Confirmed dates	16 Aug 2027	20 Aug 2027	**£1,450.-**
Online Confirmed dates	16 Aug 2027	20 Aug 2027	**£1,250.-**
Paris Confirmed dates	6 Sept 2027	10 Sept 2027	**£2,860.-**
Online Confirmed dates	6 Sept 2027	10 Sept 2027	**£1,250.-**
Rome Confirmed dates	13 Sept 2027	17 Sept 2027	**£2,450.-**
Online Confirmed dates	13 Sept 2027	17 Sept 2027	**£1,250.-**
Istanbul Confirmed dates	20 Sept 2027	24 Sept 2027	**£2,650.-**



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Dates, venues and fees (continued)

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Online Confirmed dates	20 Sept 2027	24 Sept 2027	**£1,250.–**
Amsterdam Confirmed dates	4 Oct 2027	8 Oct 2027	**£2,540.–**
Online Confirmed dates	4 Oct 2027	8 Oct 2027	**£1,250.–**
Singapore Confirmed dates	18 Oct 2027	22 Oct 2027	**£2,820.–**
Online Confirmed dates	18 Oct 2027	22 Oct 2027	**£1,250.–**
London Confirmed dates	1 Nov 2027	5 Nov 2027	**£2,450.–**
Online Confirmed dates	1 Nov 2027	5 Nov 2027	**£1,250.–**
Rome Confirmed dates	8 Nov 2027	12 Nov 2027	**£2,450.–**
Online Confirmed dates	8 Nov 2027	12 Nov 2027	**£1,250.–**



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Dates, venues and fees (continued)

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Online Confirmed dates	15 Nov 2027	19 Nov 2027	**£1,250.–**
Frankfurt Confirmed dates	6 Dec 2027	10 Dec 2027	**£2,650.–**
Online Confirmed dates	6 Dec 2027	10 Dec 2027	**£1,250.–**
Kuala Lumpur Confirmed dates	13 Dec 2027	17 Dec 2027	**£1,450.–**
Online Confirmed dates	13 Dec 2027	17 Dec 2027	**£1,250.–**



Course content

Plan your next step

Dates, availability, exact venue, taxes, inclusions and payment terms require written confirmation. This brochure is not a quotation, registration, booking confirmation or visa invitation. Participants receive a Smart Horizon UK certificate of attendance; programmes are not externally accredited and do not award a professional qualification or designation. Confirm arrangements before booking travel.

For group or in-house training, contact our learning team to discuss your objectives and delivery arrangements.

Contact Smart Horizon

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View the latest course details online