

CRM and Lifecycle Marketing Essentials

Duration: 5 Days

Language: en

Course Code: PM1-126

Objective

By the end of this course, participants will be able to:

- Understand the principles and components of CRM and lifecycle marketing.
- Design and manage customer journeys from acquisition to retention and advocacy.
- Implement data-driven CRM campaigns using automation tools.
- Use segmentation, scoring, and analytics to personalise customer communication.
- Align CRM initiatives with sales and customer success goals to boost long-term loyalty.

Audience

This course is ideal for:

- CRM and Lifecycle Marketing Managers.
- Digital Marketing and Growth Specialists.
- Customer Success and Retention Teams.
- Business Development and Account Managers.
- Data Analysts and Marketing Automation Professionals.

Training Methodology

The course combines lectures, practical demonstrations, and case-based analysis. Participants will work on CRM strategy models, customer segmentation maps, and lifecycle campaign plans, gaining both conceptual understanding and real-world application.

Summary

This comprehensive training course is designed for professionals seeking to master **Customer Relationship Management** (CRM) and Lifecycle Marketing—two cornerstones of sustainable business growth.
It provides a deep understanding of how to manage customer data, design lifecycle campaigns, and build retention-focused marketing strategies. Participants will learn to integrate CRM tools with digital marketing automation, personalise communication at every stage of the customer journey, and optimise engagement for measurable ROI.

The course also highlights advanced lifecycle analytics and segmentation models, enabling professionals to align marketing, sales, and service teams under one unified CRM strategy that enhances customer satisfaction and drives profitability.

Course Content & Outline

Section 1: Introduction to CRM and Lifecycle Marketing

- The evolution of CRM: from contact management to predictive engagement.
- Key principles of customer lifecycle marketing.
- Understanding the customer journey: awareness, acquisition, retention, and advocacy.
- Aligning CRM strategies with business and marketing objectives.

Section 2: CRM Systems, Tools, and Data Management

- Overview of leading CRM platforms (Salesforce, HubSpot, Zoho, Dynamics).
- Structuring and managing customer data for actionable insights.
- Integration of CRM with digital marketing tools and analytics dashboards.
- Ensuring data quality, accuracy, and compliance (GDPR, data privacy).

Section 3: Customer Segmentation and Personalisation

- Principles of data segmentation and predictive modelling.
- Behavioural, demographic, and psychographic segmentation techniques.
- Creating customer personas and value-based clusters.
- Using automation for personalised customer communication across channels.

Section 4: Lifecycle Campaign Design and Automation

- Building lifecycle marketing campaigns: onboarding, retention, reactivation.
- Designing customer journeys through email, social media, and paid channels.
- Workflow automation and CRM triggers for engagement.
- Measuring and optimising campaign performance with key lifecycle KPIs.

Section 5: Analytics, Retention, and Growth Strategies

- Using CRM analytics for forecasting, churn prediction, and ROI measurement.
- Developing retention strategies based on customer behaviour data.
- Integrating sales, service, and marketing insights for unified growth.
- Implementing feedback loops and NPS tracking to enhance customer loyalty.

Certificate Description

Upon successful completion of this training course, delegates will be awarded a Holistique Training Certificate of Completion. For those who attend and complete the online training course, a Holistique Training e-Certificate will be provided.

Holistique Training Certificates are accredited by The CPD Certification Service (CPD), and are certified under ISO 9001 and ISO 29993 standards.

CPD credits for this course are granted by our Certificates and will be reflected on the Holistique Training Certificate of Completion. In accordance with the standards of The CPD Certification Service, one CPD credit is awarded per hour of course attendance. A maximum of 50 CPD credits can be claimed for any single course we currently offer.

Categories

AI, Data and Visualisation, Sales & Marketing

Tags

Lifecycle Marketing, Customer Relationship Management, CRM, Marketing Managers

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