
CRM Strategy, Implementation and Adoption Training Course

12 – 16 July 2027
Geneva





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Programme Summary

CRM strategy and implementation is a five-day training course for senior commercial leaders at strategic level, culminating in a CRM strategy and adoption roadmap for their own organisation. Many organisations buy capable CRM platforms yet see low usage, unreliable pipeline data and sales and service processes that bypass the system altogether. The approach links strategy, operating model, platform selection, process design, data and adoption into one governed programme. Mars Training Centre UK delivers this programme in CRM strategy and implementation.

The Business Case

A CRM platform that staff avoid becomes an expensive address book: forecasts are guessed, handovers between marketing, sales and service fail, and leaders cannot see which customers or deals need attention. Leaders who set a clear CRM strategy, design processes before configuring software and manage adoption deliberately turn the platform into the place where commercial work is planned, recorded and reviewed.

- Forecast Accuracy and Pipeline Visibility: Improve as opportunity stages, entry rules and reviews are standardised in the CRM.
- Sales and Service Productivity: Rises as routine tasks, routing and handovers are automated within agreed processes.
- Return on CRM Investment: Strengthens as adoption, data quality and usage are measured and acted upon.

Principles and Evidence Base

- Payne and Frow Strategic Framework for CRM: Structures the five cross-functional processes of strategy development, value creation, multichannel integration, information management and performance assessment in Session 1.
- Eight Building Blocks of CRM: Provides the diagnostic of vision, strategy, customer experience, organisational collaboration, processes, information, technology and metrics used in Sessions 1 and 5.
- Operational, Analytical and Collaborative CRM: Frames the scoping of platform capabilities and requirements in Session 2.



Intended Participants

- Leaders who sponsor or own a CRM programme and its budget.
- Executives accountable for sales operations, pipeline reporting and forecasting.
- Senior managers who design marketing, sales and service processes across functions.
- Leaders responsible for customer data quality and system integration.

The programme serves financial services, telecommunications, industrial and business-to-business suppliers, and professional services firms.

Learning Outcomes

1. Participants will be able to diagnose the maturity of an existing CRM estate against recognised building blocks.
2. Participants will be able to construct a CRM strategy and operating model linked to commercial objectives.
3. Participants will be able to evaluate CRM platforms and implementation approaches against defined requirements.
4. Participants will be able to design pipeline, opportunity and service processes for configuration in the CRM.
5. Participants will be able to prioritise data quality, integration and governance actions.
6. Participants will be able to justify an adoption plan with usage measures and leadership routines.

Programme Structure

Day 1: CRM Strategy and Implementation Foundations

What should CRM achieve for the organisation, and how mature is it today?

- Payne and Frow Five Cross-Functional Processes
- CRM Maturity Diagnostic Using the Eight Building Blocks
- Customer Relationship Operating Model and Ownership
- CRM Vision Linked to Commercial Objectives
- Causes of CRM Programme Failure

Day 2: Platform Requirements and Selection

Which capabilities are needed, and how is the right platform and partner chosen?

- Operational, Analytical and Collaborative CRM Scope
- Business Requirements and User Stories
- Vendor Shortlisting and Scripted Demonstrations
- Total Cost of Ownership and Licence Models
- Implementation Partner Selection and Phased Delivery Plans



Day 3: Pipeline, Sales and Service Process Design

How are commercial processes designed so that the CRM supports rather than burdens users?

- Opportunity Stages, Exit Criteria and Pipeline Hygiene
- Lead Routing and Marketing-to-Sales Handover
- Account and Contact Hierarchies
- Service Case Management and Escalation Workflows
- Forecasting Methods and Pipeline Review Cadence

Day 4: Data, Integration, Adoption and Governance

How are data kept reliable, systems connected and users brought on board?

- Customer Data Standards and Deduplication Rules
- Integration With Finance, Marketing and Service Systems
- User Adoption Planning and Change Champions
- Usage Dashboards and Adoption Metrics
- CRM Steering Committee and Change Request Control

Day 5: Applying the CRM Strategy and Adoption Roadmap

How are strategy, platform, process, data and adoption combined into one plan?

- Maturity Review of a Participant CRM Estate
- Target Operating Model and Platform Choices
- Process and Data Priorities for the First Release
- Peer Challenge of Adoption and Governance Plans
- CRM Strategy and Adoption Roadmap Presentation

Methodology

The programme is built around case analysis of CRM programmes in banking, telecommunications and industrial supply. Participants examine why some implementations stalled and others became part of daily commercial work, then apply each diagnostic, design and selection tool to their own organisation so that every session adds a section to the roadmap.

- Suggested activity: Scoring a CRM estate against the eight building blocks.
- Suggested activity: Running a scripted vendor demonstration against prepared user stories.
- Suggested activity: Redesigning opportunity stages and exit criteria for a business-to-business sales team.



Capstone Output

Each participant completes a CRM strategy and adoption roadmap for their organisation. It contains a maturity baseline, a target operating model, platform and partner decisions, priority processes for the first release, data and integration actions, and an adoption plan with usage measures, ready for the steering committee.

Frequently Asked Questions

Is CRM strategy and implementation suitable for leaders without a technical background?

Yes. It suits commercial directors, heads of sales operations and CRM programme owners. It assumes senior commercial experience but no configuration skills.

Which frameworks underpin CRM strategy and implementation in this programme?

It draws on the Payne and Frow strategic framework for CRM, the eight building blocks of CRM, and the distinction between operational, analytical and collaborative CRM.

How is the CRM strategy and adoption roadmap used at work?

You take back a roadmap that a CRM steering committee can approve and track, with release priorities and usage measures.

How does CRM strategy and implementation differ from a customer loyalty and retention course?

It concentrates on the platform, processes, data and adoption behind customer relationships, not reward schemes or retention campaigns.