
AI in CRM Training Course: Customer Data, Prediction and Commercial Value

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Milan





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Programme Summary

AI in CRM is the subject of this one-week training course for heads of sales, marketing and customer experience, ending in a customer data and prediction plan for one commercial function. Customer records, service histories and pipeline notes hold signals that teams rarely use, while new prediction and generative tools arrive faster than the data and rules to support them. The programme moves from a customer data audit to prediction use cases, service and sales assistance, governance and value tracking, applied to a function you select. Mars Training Centre UK delivers this programme on AI in CRM to mixed-organisation cohorts.

The Business Case

Customer relationship systems shape how quickly a sales team sees a risk, how consistently a service team responds and how much commercial effort goes to the right accounts. When AI tools are added to poor records, forecasts mislead and customers receive irrelevant contact. Leaders who test data readiness, choose use cases on evidence and set oversight rules turn customer data into dependable commercial decisions.

- Lead Conversion Quality: Improves as scoring models are tested against outcomes and tuned to the sales process.
- Customer Retention: Improves as early churn signals trigger agreed service actions.
- Data Quality Exposure: Falls as record ownership and validation rules are set and reviewed.

Principles and Evidence Base

- ISO/IEC 42001: Sets the management system logic for AI that the programme uses to define ownership, controls and review of each CRM use case.
- NIST AI Risk Management Framework: Provides the govern, map, measure and manage functions applied to a risk review of a chosen prediction model.
- Customer Lifetime Value Model: Links acquisition, retention and margin, and is used in Session 3 to rank which customers deserve action first.

Intended Participants

- Heads of sales who own pipeline reviews and forecasts.
- Marketing leaders who segment customers and plan campaigns from CRM data.
- Customer experience directors who oversee service journeys and complaint handling.
- Commercial directors who sponsor CRM investment and set data rules.
- Senior managers who brief analytics and technology teams on commercial needs.



Typical sectors include banking, retail, telecommunications and healthcare services.

Learning Outcomes

1. Participants will be able to diagnose gaps in CRM data that limit prediction.
2. Participants will be able to prioritise AI use cases by commercial value and feasibility.
3. Participants will be able to evaluate a lead scoring or churn model against observed outcomes.
4. Participants will be able to design a human review step for generative AI used in service and sales.
5. Participants will be able to construct a governance and risk review for a CRM use case.
6. Participants will be able to justify a value tracking plan to a board sponsor.

Programme Structure

Day 1: AI in CRM and the Customer Data Audit

Which customer data supports prediction, and which does not?

- Customer Data Inventory
- Record Completeness Scoring
- Duplicate and Ownership Review
- Data Readiness Scorecard
- Signal Source Mapping

Day 2: Prediction Use Cases and Prioritisation

Which AI use cases deserve investment first?

- Use Case Long List
- Value and Feasibility Matrix
- Next-Best-Action Design
- Lead Scoring Logic
- Churn Signal Definition

Day 3: Models, Customer Value and Evidence

How is a prediction model tested before it guides decisions?

- Customer Lifetime Value Model
- Holdout Testing of Scores
- Bias and Drift Checks
- Threshold and Action Rules
- Model Evidence Pack



Day 4: Generative Assistance, Governance and Oversight

How are AI assistants in service and sales kept safe and accountable?

- Generative Assistant Use Cases
- Human Review Step Design
- ISO/IEC 42001 Control Mapping
- NIST AI Risk Management Framework Review
- Customer Consent and Privacy Rules

Day 5: Value Tracking and the CRM AI Plan

Do the data, use cases, models and controls hold together for one function?

- Applying the Session 1 Data Readiness Scorecard
- Testing the Session 2 Value and Feasibility Matrix
- Checking the Session 3 Model Evidence Pack
- Reviewing the Session 4 Human Review Step
- Completing the CRM AI Plan

Methodology

The programme uses a data workshop method built on a shared case of a mid-sized commercial organisation with uneven CRM records, rising churn and pressure to adopt AI assistants. Participants apply each tool to the case and then to their own function.

- Suggested activity: Scoring a sample customer file for completeness and ownership gaps.
- Suggested activity: Ranking six AI use cases on a value and feasibility matrix.
- Suggested activity: Drafting the human review step for an AI-written customer reply.

Capstone Output

Each participant completes a CRM AI plan for one commercial function. It holds a data readiness scorecard, a ranked use case list, a model evidence pack, a human review step, a governance and risk review and a value tracking plan. The plan is used at work to brief sponsors, instruct analytics teams and guide the first pilot.

Frequently Asked Questions

Is AI in CRM training suitable for leaders without a data science background?

Yes. AI in CRM is taught through cases and templates, so the programme assumes experience of running a sales, marketing or service function but no coding or statistics skills.



Which standards does AI in CRM training rest on?

AI in CRM training rests on ISO/IEC 42001 for management of AI and the NIST AI Risk Management Framework for risk review, alongside the customer lifetime value model.

How is the plan from AI in CRM training used at work?

You use the CRM AI plan to brief sponsors, instruct analytics and technology teams and run the first pilot for one commercial function.

How does AI in CRM differ from customer analytics training?

AI in CRM centres on prediction, assistants and governance inside customer relationship systems, while customer analytics training centres on reporting and general data analysis.