



Mastering CRM: From Connection to Loyalty

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Workshop Plan

Day 1: CRM Foundations & Customer-Centric Service

Theme: Understanding and Designing Great Customer Experiences

Day 2: Customer Retention & Acquisition Strategies

Theme: Turning Data into Loyalty & Growth



Activity 1: Customer Care Matchup



Customer Care Matchup

Group A

Common customer care situations or complaints

Group B

Ideal service responses or actions



Activity Instructions

Group A will match customer complaints to Group B's solutions, noting names and companies.

Customer Care Matchup

“Apologize and offer to check tracking or resend the item.”

“Acknowledge the mistake and offer a replacement or fix.”

“Thank them for their patience, escalate if needed, and follow through.”

“Apologize, troubleshoot the issue, and report it to the tech team.”

Customer Care Matchup


“Stay calm, listen actively, and offer to help resolve the issue first.”

“Offer a walkthrough or link to a simple tutorial.”

“Verify the charges and issue a refund or correction.”

“Explain the value clearly and offer any available discounts.”

“Resend the confirmation and ensure their info is correct.”



Customer Care Matchup

“Review refund policy and guide them through the process.”

“Provide a simple step-by-step setup guide or offer a callback.”

“Clarify the policy and take responsibility for the communication gap.”

“Acknowledge their frustration and update them with a timeline.”

Customer Care Matchup

“Use plain language and offer to walk them through it.”

“Verify the discount and apply it if promised.”

“Apologize, log the feedback, and reassure them of action.”

“Listen without interrupting, show empathy, and summarize their concern.”



What is CRM?





What is CRM?

Customer Relations Management - CRM

- A strategy, process, and technology to manage interactions with customers and prospects.
- Goal: Build long-term relationships, improve customer satisfaction, and drive business growth.

Key Functions

- Customer Data management
- Sales Automation
- Marketing Campaigns
- Customer Service/Support



Core Components of CRM

Building Blocks of CRM

- Customer Data Management
 - Centralized customer info (contact details, purchase history, etc.)
- Sales Automation
 - Streamline sales processes
- Marketing Automation
 - Targeted campaigns, customer segmentation
- Customer Service
 - Ticketing, helpdesk, self-service portal

Why CRM Matters



- Improved Customer Experience
 - Personalized service
 - Faster issue resolution
- Increased Efficiency
 - Automation
 - Reduce manual errors
- Better Decision Making
 - Data driven strategic planning
- Higher Revenue
 - Upselling, cross-selling and retention
- Competitive Advantage

CRM in Telecom

Challenges:

- High churn rates
- Complex billing
- Customer service demands

Solutions:

- Personalized Offers
- Proactive Support
- Churn Reduction





CRM in LPG

Challenges:

- Logistics (delivery issues)
- Safety compliance
- Customer trust

Solutions:

- Order Management
 - Safety Alerts
 - Loyalty Programs
-

Activity 2: Group Discussion



Group Discussion Instructions



- Share one best and one worst customer experience
- Discuss: what made the difference
- Choose a spokesperson to share key insights

Objective:

Identify factors that influence customer satisfaction and relate them to CRM

Customer Journey Mapping

Learn to map customer journeys and identify improvement opportunities





Topics

- What is Customer Journey Mapping?
- Why It Matters: Benefits & Applications
- Key Elements of a Customer Journey Map
- Industry Context: Telecom & LPG Customer Journeys

CUSTOMER JOURNEY

CUSTOMER JOURNEY



What is Customer Journey Mapping

Customer journey mapping is essentially creating a visual story of your customer's entire experience with your company.

It's like drawing a map of every interaction they have with your business, from the moment they first hear about you until long after they've made a purchase.



What is Customer Journey Mapping

Customer journey mapping tracks:

- The stages a customer goes through (awareness, consideration, purchase, service, loyalty)
- The touchpoints where they interact with your business (website, social media, phone calls, in-store visits)
- The emotions they feel at each step
- The pain points or obstacles they encounter
- The opportunities to improve their experience

Customer Journey

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Why it is important

Reveals the customer's perspective

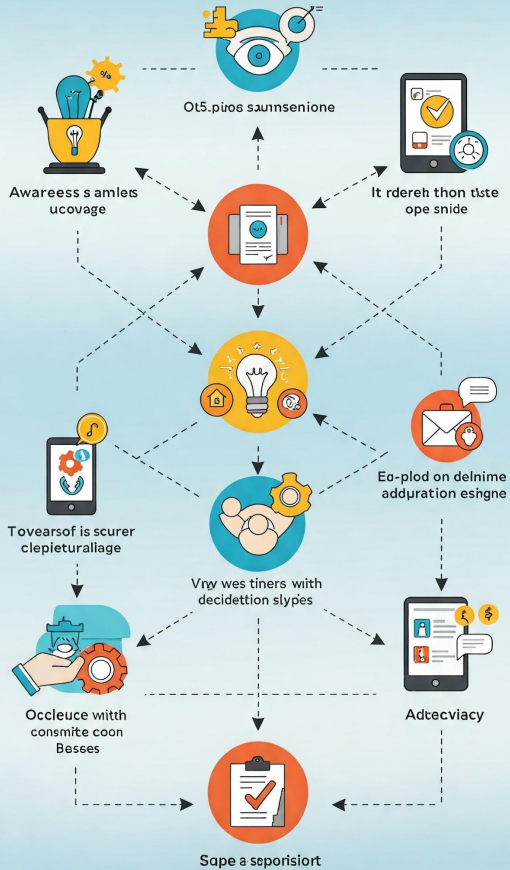
Identifies gaps and pain points

Breaks down silos:

Guides improvements:

Increases customer retention

CUSTOMER JOURNEY



Key elements of CJM

Stages

- Awareness
- Consideration
- Purchase
- Onboarding
- Usage
- Support
- Retention

Activity 3: Customer Journey Mapping



Activity Instruction

- Choose one scenario
- Use large paper, sticky notes, and markers.
- Map the journey:
 - Define stages (e.g., Awareness to Retention).
 - List customer actions, touchpoints, and emotions.
 - Highlight pain points and opportunities

- Prepare a 2-minute presentation of your map

Objective: Practice CJM and identify improvement areas.



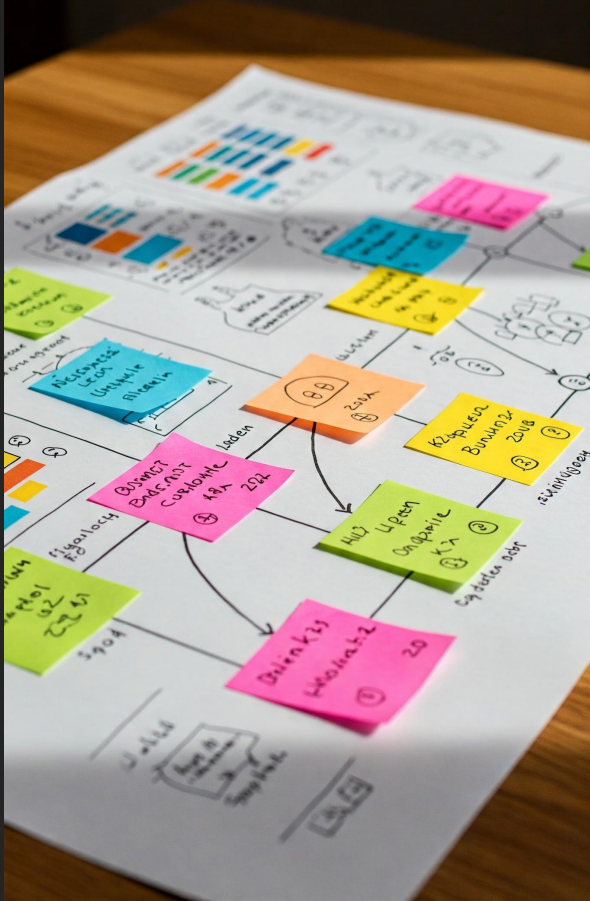
Customer Journey Mapping vs Ideal Journey Mapping



CJM vs IJM

Traditional CJM

- Built from **observations, data, and internal assumptions** about how a customer moves through the stages of engagement.
- Focuses on pain points, emotions, touchpoints, etc.
- Often done **from the company's perspective** looking outward.



CJM vs IJM

Ideal Journey Mapping

Ask customer

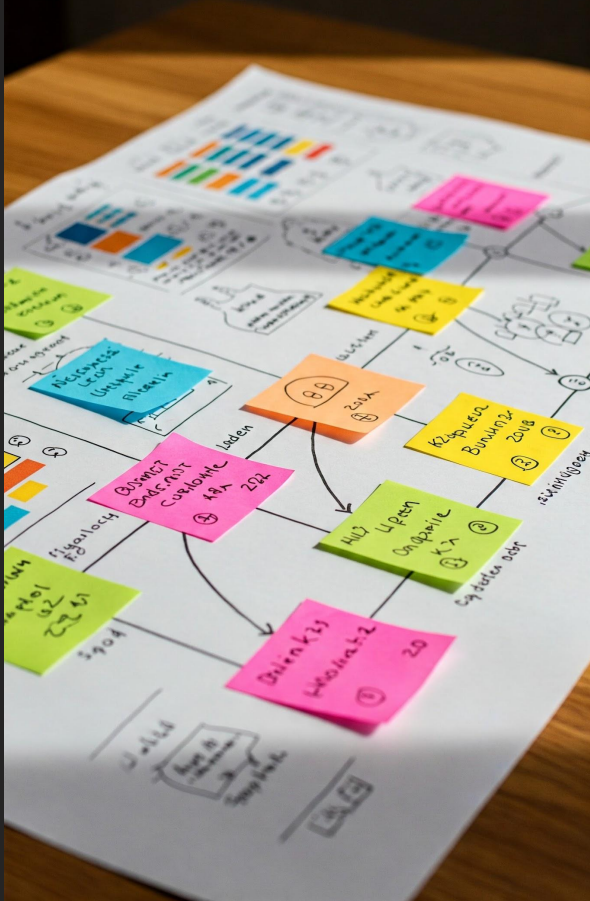
"What would an ideal experience look like for you at each stage?"

company → customer to **customer** → **company**.



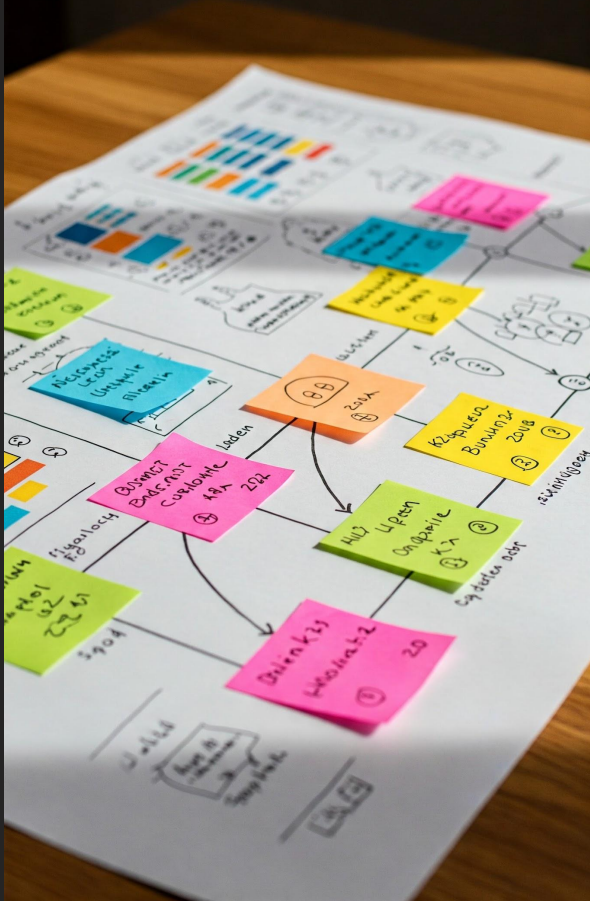
Benefits of IJM

- **Direct insight** into what customers actually value.
- Can uncover ideas and needs your team wouldn't even think to ask about.
- Encourages **empathy** and **innovation** in service design.
- Great for **co-creation workshops** or qualitative interviews.



Ways to collect “Ideal Journey” insight

- **Interviews:** Ask customers to walk through an ideal version of their experience.
- **Workshops:** Co-create a journey map with customers.
- **Surveys:** For each stage, ask “What would make this step outstanding for you?”
- **Storytelling prompts:** “Tell me about the best experience you’ve had with a brand like ours.”



Managing Expectations and Delivering Service






Managing Expectations

Topics

- What is Service Excellence?
- Managing Customer Expectations
- Role of Empathy in Service Recovery
- CRM Tools for Service Excellence


Objective:

Learn to manage expectations and deliver exceptional service



What is Service Excellence

Delivering consistent, high-quality customer experiences that exceed expectations.



Core Principles



Reliability



Empathy



Responsiveness



Empathy



- **Reliability:** Deliver on promises (e.g., timely service, accurate billing).
- **Responsiveness:** Quick and effective issue resolution.
- **Empathy:** Understand and address customer emotions.
- **Personalization:** Tailor interactions to customer needs.



Core Principles

Outcome:

Increased trust, loyalty, and positive word-of-mouth.



Managing Customer Expectations

Strategies:

1. **Clear Communication:** Provide accurate info (e.g., delivery times).
2. **Proactive Updates:** Inform customers of delays or issues.
3. **Under-Promise, Over-Deliver:** Set realistic goals and exceed them.
4. **Feedback Loops:** Use surveys or CRM data to understand expectations.



Role of Empathy in Service Recovery

Empathy: The Heart of Service

Definition:

Understanding and sharing a customer's feelings to build trust.



Role of Empathy in Service Recovery

Empathy in Action:

- Listen actively without interrupting.
- Acknowledge emotions (e.g., “I understand this must be frustrating”).
- Offer solutions tailored to the customer’s needs.



Role of Empathy in Service Recovery

Impact:

Turns negative experiências into positive ones, reduces churn.

Statistics:

70% of customers stay loyal after empathetic service recovery (HubSpot, 2024).



CRM Tools For Service Excellence

Leveraging CRM for Better Service

- **Customer Data:** Access history (e.g., past complaints, preferences) for personalized responses.
- **Ticketing Systems:** Track and resolve issues efficiently.
- **Automated Alerts:** Notify teams of urgent complaints or escalations.
- **Analytics:** Identify recurring issues to prevent future complaints.



Activity 4: Analyzing Complaint



Activity Instruction

Case study: customer complaint

- Unexpected data charges
- Delayed cylinder delivery, causing inconvenience

Task:

1. In small groups, analyze the complaint.
2. Identify: What went wrong? What are the customer's emotions?
3. Suggest: How to resolve using empathy and CRM tools.

Comparing studied

Statement of

What went
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Key Takeaways

What We've Learned

1. Service excellence means exceeding expectations through reliability, responsiveness, and empathy.
2. Manage expectations with clear communication and proactive updates.



Key Takeaways

What We've Learned

1. Empathy is critical for service recovery—listen, acknowledge, and solve.
2. CRM tools enhance service by providing data, tracking issues, and enabling personalization.
3. Practice makes perfect: Use role plays to build confidence in handling complaints.



End of Day 1




Workshop Plan

~~Day 1: CRM Foundations & Customer-Centric Service~~

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Building Customer Loyalty

Loyalty Drivers and Emotional Connection



What is customer Loyalty

Definition

- Customer loyalty is the likelihood of customers repeatedly choosing a brand over competitors due to positive experiences, trust, and emotional attachment.



Why it Matters

- **Increases customer lifetime value (CLV)**
- **Reduces churn rate**
- **Drives word-of-mouth marketing**
- **Enhances brand advocacy**

Statistic: Loyal customers are 5x more likely to repurchase and 4x more likely to refer a brand (Source: Bain & Company).



Loyalty Drivers



Key Drivers of Customer Loyalty

1. **Quality of Product/Service**
 - Consistency and reliability build trust.
2. **Customer Experience (CX)**
 - Seamless, personalized, and responsive interactions.
3. **Value for Money**
 - Fair pricing and perceived benefits.
4. **Brand Values and Trust**
 - Alignment with customer beliefs and ethical practices.
5. **Rewards and Incentives**
 - Tangible benefits like discounts, points, or exclusive access.

Emotional Connection

Why Emotions Matter

- Emotional loyalty > Transactional loyalty

Customers with an emotional connection are 2x more valuable than satisfied customers (Source: Harvard Business Review).



Building Emotional Loyalty



- **Personalization:** Tailor experiences to individual preferences.
- **Storytelling:** Share authentic brand stories that resonate.
- **Community:** Foster a sense of belonging (e.g., brand communities).
- **Empathy:** Show care through customer support and social responsibility.

Loyalty Program Examples



- **Starbucks Rewards**
 - a. Points-based system (Stars) for free drinks/food.
 - b. Personalized offers via app.
 - c. Emotional connection: Community feel and sustainability initiatives.
- **Amazon Prime**
 - a. Subscription-based with free shipping, streaming, and exclusive deals.
 - b. High perceived value drives retention.
- **Sephora Beauty Insider**
 - a. Tiered program (Insider, VIB, Rouge) with exclusive events and samples.
 - b. Emotional connection: Beauty community and personalized recommendations.

Activity 2: Loyalty



Retention Techniques and Churn Prevention

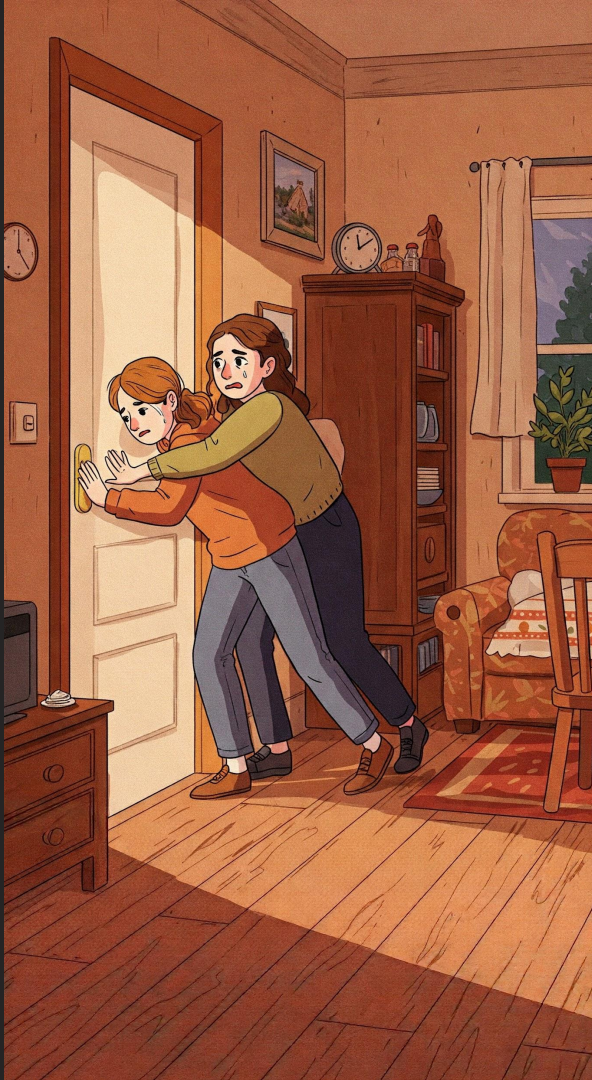
Identifying Churn Signals, Case Study, and Crisis Management Simulation



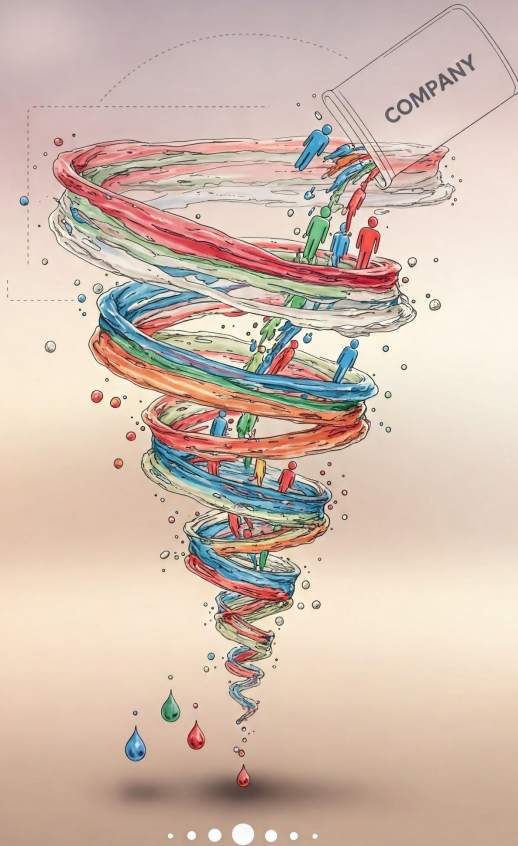
Understanding Retention & Churn

What is Churn?

- Churn occurs when customers stop doing business with a company (e.g., cancel subscriptions, cease purchases).



CHURN



Understanding Retention & Churn

Why Retention Matters

- Retaining existing customers is 5-25x cheaper than acquiring new ones (Source: Harvard Business Review).
- A 5% increase in retention can boost profits by 25-95% (Source: Bain & Company).

CUSTOMER CHURN



Identifying Churn Signals

Types of Churn Signals

1. Data Patterns

- Declining usage (e.g., fewer logins, reduced transaction frequency).
- Drop in engagement metrics (e.g., email open rates, app activity).
- Negative feedback in surveys or NPS scores.

2. Behavioral Cues

- Customer complaints or repeated support tickets.
- Price sensitivity (e.g., inquiries about discounts or competitors).
- Reduced interaction with loyalty programs or rewards.

Churn



Churn



Proactive Churn Prevention Strategies

How to Act on Churn Signals

- 1. Segmentation**
 - Identify at-risk customers using data (e.g., low engagement, high support tickets).
- 2. Personalized Outreach**
 - Tailored offers, check-in emails, or dedicated account managers.
- 3. Customer Success Programs**
 - Onboarding support, regular check-ins, and training.
- 4. Incentives**
 - Discounts, loyalty rewards, or exclusive features for at-risk customers.
- 5. Feedback Loops**
 - Act on customer feedback to address pain points.

CHURN



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Case Study: Netflix Retention Strategy

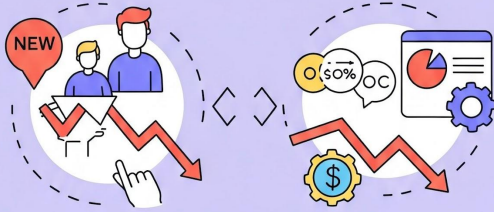
Background

- In 2019, Netflix faced increased churn due to rising competition (Disney+, HBO Max).

Churn Signals Identified

- Declining watch time and account cancellations after price hikes.
- Negative sentiment on social media (e.g., X posts about cost vs. value).

CHURN

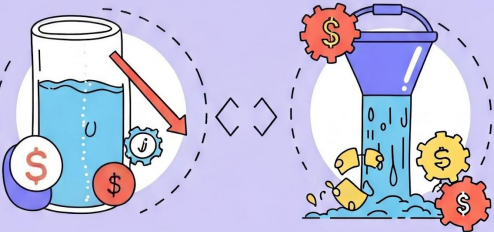


Shorter

Churns on service



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Case Study: Netflix Retention Strategy

Actions Taken

- Personalized content recommendations using AI.
- Introduced flexible pricing tiers (e.g., mobile-only plans in select markets).
- Enhanced customer support with live chat and self-service options.

Results

- Reduced churn by 12% within 6 months.
- Increased subscriber retention through targeted re-engagement campaigns.

CHURN



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Customer Loss



Best Practice for Crisis Retention

Key Tips for Retaining High-Value Customers

- 1. Act Quickly**
 - Respond to complaints within 24 hours to show urgency.
- 2. Empathize and Apologize**
 - Acknowledge the issue and validate the customer's feelings.
- 3. Offer Tailored Solutions**
 - Provide compensation aligned with the customer's value (e.g., free month, upgraded features).
- 4. Follow Up**
 - Check in post-resolution to ensure satisfaction.
- 5. Learn and Improve**
 - Use the crisis to fix systemic issues and prevent recurrence.

CHURN



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Customer Loss



Best Practice for Crisis Retention

Name a brand with a loyalty program you like.

What's one reward you would love to see in a loyalty program?

What makes a loyalty program successful?

What's a bad experience you had with a loyalty program?

CHURN



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Customer Loss



Best Practice for Crisis Retention

What We Learned

- Churn signals include data patterns (e.g., declining usage) and behavioral cues (e.g., complaints).
- Proactive strategies like personalization and incentives can prevent churn.
- Netflix's success shows the power of AI-driven retention and flexible offerings.
- Crisis management requires empathy, quick action, and tailored solutions.