



Accredited Africa Training Institute for Capacity Development

Unit FO409, Hatfield Plaza · 1122 Burnett St, Hatfield 0028 · Pretoria, Gauteng · South Africa

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COURSE BROCHURE

Customer Relationship Management And Retention Strategies Training

Services / Transport, Operations and Logistics

Unit Standard 113847 · NQF Level 3 · 10 Credits · 7 Days

COURSE OVERVIEW

This course equips learners with the knowledge and skills to manage customer relationships effectively and implement retention strategies that foster loyalty and long-term engagement. Participants will learn to analyze customer needs, design service excellence frameworks, and apply retention techniques to enhance organisational competitiveness.

Category	Services
Subfield	Transport, Operations and Logistics
Unit Standard	113847
Accreditation	SAQA Accredited · NQF Level 3 · 10 Credits
Duration	7 days
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Apply customer relationship management principles to identify and segment customer groups based on value and needs.
- Analyze customer feedback and behavioural data to evaluate satisfaction levels and retention risks.
- Design a customer retention strategy that incorporates loyalty programmes, communication plans, and service recovery mechanisms.
- Implement a customer relationship management system to track interactions and improve service delivery.
- Demonstrate effective communication and conflict resolution skills to manage challenging customer interactions.
- Evaluate the impact of retention strategies on organisational performance and customer lifetime value.

COURSE OUTLINE

Day 1: Foundations of Customer Relationship Management

- Definition and scope of CRM
- Strategic importance of CRM for business growth
- Key components: people, process, technology
- Evolution of marketing: transactional vs. relationship marketing
- Benefits of effective CRM
- Introduction to customer lifecycle management

Day 2: Understanding Customer Needs and Expectations

- Customer segmentation and profiling
- Creating customer personas
- Methods for collecting customer feedback (surveys, interviews, social listening)
- Service quality gaps model (SERVQUAL)
- Customer journey mapping
- Touchpoint analysis

Day 3: Building Customer Loyalty and Trust

- Psychology of customer loyalty
- Trust-building strategies
- Emotional connection and brand attachment
- Types of loyalty programmes (points, tiers, partnerships)
- Rewards vs. recognition
- Ethical considerations in loyalty programmes

Day 4: Effective Communication and Engagement Strategies

- Communication models in CRM
- Personalisation and customisation
- Active listening and empathy skills
- Service recovery and complaint handling
- Omnichannel communication strategies
- Social media engagement and community building

Day 5: CRM Technology and Data Management

- Overview of CRM software (Salesforce, HubSpot, Zoho)
- Data management lifecycle: collection, storage, analysis
- Using CRM dashboards and reports
- Data-driven decision making
- Customer data privacy (POPIA, GDPR)
- Ethical use of customer data

Day 6: Measuring CRM and Retention Performance

- CRM KPIs: retention rate, churn rate, CLV, NPS
- Calculating and interpreting CLV
- Churn analysis and early warning signs
- Return on investment (ROI) of CRM initiatives
- Balanced scorecard for CRM

- Benchmarking and continuous improvement

Day 7: Integrating CRM Strategies into Business Operations

- CRM implementation roadmap
- Change management and cultural transformation
- Cross-functional collaboration (sales, marketing, service)
- Budgeting and resource allocation
- Case studies of successful CRM integration
- Final project: present a CRM and retention strategy plan

ASSESSMENT & CERTIFICATION

Delegates are assessed through exercises and a final test. A mark of **50% or above** earns an **AATICD Certificate of Completion**, issued digitally with a unique verification code. This course carries **10 NQF credits** at **NQF Level 3**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 28,200.00	R 28,200.00
1	In-House	R 36,700.00	R 36,700.00
1	On-Campus (Pretoria)	R 42,300.00	R 42,300.00

UPCOMING SESSIONS

Start	End	Method	Venue
03 Aug 2026	11 Aug 2026	On-Campus	Dubai, UAE
04 Aug 2026	12 Aug 2026	On-Campus	Pretoria, South Africa
04 Aug 2026	12 Aug 2026	On-Campus	Lagos, Nigeria
05 Aug 2026	13 Aug 2026	On-Campus	Johannesburg, South Africa
06 Aug 2026	14 Aug 2026	On-Campus	Mauritius
07 Aug 2026	17 Aug 2026	On-Campus	Cape Town, South Africa
10 Aug 2026	18 Aug 2026	On-Campus	Pretoria, South Africa
11 Aug 2026	19 Aug 2026	On-Campus	Abu Dhabi, UAE

Contact us if no suitable date is listed – on-demand sessions can be arranged for groups.

HOW TO GET A QUOTE OR APPLY

1. **Get an instant quotation online:** visit www.aaticd.co.za, open the page for this course (Unit Standard 113847) and click **Get A Quote / Apply**. Select your training method and number of delegates – your quotation is generated immediately and emailed to you with the course brochure attached.
2. **Apply by email:** send the course title, your preferred training method (Online, In-House or On-Campus Pretoria), the number of delegates and your preferred dates to apply@aaticd.co.za – our team will reply with a formal quotation.
3. **Apply by phone or WhatsApp:** call **+27 12 004 8389** or WhatsApp **+27 65 077 6310** and we will prepare your quotation and reserve your seats.
4. **Confirm your booking:** accept the quotation and settle the invoice. As soon as payment is confirmed your delegates are enrolled and receive their AATICD LMS login details by email, along with joining instructions for their chosen training method.

Group discounts apply automatically – the more delegates you enrol, the lower the price per delegate. No payment is required to request a quotation.

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