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COURSE BROCHURE

AI Enhanced CRM and Customer Analytics Training Course

7 – 11 February 2027
Online

AI Enhanced CRM and Customer Analytics Training Course

Ref: **80_2024** **Date:** **7 – 11 February 2027** **Location:** **Online** **Fees:** **2900 GBP**

AI Enhanced CRM and Customer Analytics is a 1-week training course for CRM managers, sales operations leads, marketing automation specialists and customer service managers, ending with a CRM intelligence playbook for one customer portfolio. Buyers now expect relevant offers and quick answers on every channel, and scoring models inside the CRM decide who gets a call, a discount or a retention offer. Jupiter Prime Training runs this AI Enhanced CRM and Customer Analytics course.

Why AI Enhanced CRM and Customer Analytics Matters Now

Customers move between web chat, messaging apps and call centres and expect each conversation to remember the last. Sales leaders want pipeline forecasts they can trust, and privacy expectations limit how customer records feed automated offers. A CRM function that scores leads, flags churn and recommends actions well grows share of wallet; one that does it badly spams loyal customers and misses defectors. The course draws on ISO/IEC 42001 for AI management and the NIST AI Risk Management Framework NIST AI RMF for testing scoring models.

Who Gains Most from AI Enhanced CRM and Customer Analytics

- Platform owners who configure CRM fields, workflows and integrations
- Sales operations staff who run pipeline stages and forecasts
- Marketing automation specialists who build segments and journeys
- Service leads who own case routing and retention
- Insight analysts who measure campaign uplift

A commercial function gains most when sales, marketing and service leads attend together and agree one customer score and one churn definition.

AI Enhanced CRM and Customer Analytics Capabilities

Participants work with lead records, case histories and campaign responses to decide where a model ranks or recommends and where a person stays in charge.

- Assess CRM duplicates and consent flags — platform owners
- Build lead scoring tested against won and lost deals — sales directors
- Design churn prediction triggers linked to retention offers — service and loyalty leads
- Specify next best action recommendations for agents and journeys — marketing automation
- Calculate campaign uplift with control groups rather than raw response — commercial finance
- Apply human review and opt-out rules to automated decisions — privacy staff

Key AI Enhanced CRM and Customer Analytics Terms

- Lead scoring — ranking prospects by likelihood to buy using profile and engagement signals held in the CRM.
- Churn prediction — estimating which existing customers are likely to leave so retention teams can act before they go.
- Next best action — the offer, message or service step most likely to help a specific customer now.
- Customer lifetime value — the expected net revenue a customer brings across the whole relationship, used to prioritise effort.
- Uplift modelling — measuring the extra response a campaign causes by comparing treated customers with a control group.
- Single customer view — one reconciled record that joins sales, marketing and service history for each customer.

AI Enhanced CRM and Customer Analytics Day by Day

Day 1: The Intelligent Customer Relationship

- Customer Lifecycle Mapping — Where Prediction Changes Choices
- CRM Maturity Assessment — Readiness of Records, Processes and Skills
- Banking and Telecoms Cases — Scoring in Daily Use
- Single Customer View Design — Joining Sales and Service Records
- Data Hygiene Audit — Duplicates, Stale Contacts and Consent Flags

Day 2: Scoring Leads and Opportunities

- Lead Scoring Models — Profile, Behaviour and Engagement Signals
- Opportunity Win Probability — Stage Rules Versus Predicted Odds
- Sales Forecast Calibration — Comparing Predicted and Closed Revenue
- Account Prioritisation — Allocating Seller Time by Value
- Customer Lifetime Value Estimates — Deciding Service Effort

Day 3: Predicting Churn and Personalising Journeys

- Churn Prediction Features — Usage Drops, Complaints and Payment Delays
- Customer Segmentation With Clustering — Needs-Based Groups for Journeys
- Next Best Action Engines — Offers, Messages and Service Steps
- Journey Orchestration Triggers — Timing Messages by Channel
- Retention Offer Economics — Incentive Cost Versus Value

Day 4: Conversational Assistants, Uplift and Control

- Conversational Assistants on the CRM Record — Case Summaries
- Uplift Testing With Control Groups — Proving Campaign Effect
- Model Drift Monitoring — When Scores Stop Matching Outcomes
- NIST AI RMF Measure Function — Bias Checks on Customer Scores
- ISO/IEC 42001 Controls — Ownership, Explanation and Opt-Out Rules

Day 5: Practising the CRM Intelligence Playbook

- Lifecycle Map and Data Audit From Day 1 — Portfolio Baseline
- Scoring and Forecast Rules From Day 2 — Seller Priorities
- Churn Triggers and Next Best Actions From Day 3 — Journey Design
- Uplift and Control Measures From Day 4 — Evidence and Safeguards
- CRM Intelligence Playbook — Sign-Off Ready Customer Portfolio Plan

Applying AI Enhanced CRM and Customer Analytics After the Course

- Score one sales team's open pipeline with the new rules and compare the ranking with the deals sellers are chasing.
- Run churn prediction on last quarter's customers and send a retention offer to half the flagged accounts, keeping the rest as a control group.

AI Enhanced CRM and Customer Analytics Questions FAQ

What is AI enhanced CRM and customer analytics and why does it matter now?

AI enhanced CRM and customer analytics is the use of scoring, prediction and recommendation models inside the customer relationship platform. It matters now because customers expect relevant contact on every channel and manual lists cannot keep pace.

Which roles gain most from AI enhanced CRM and customer analytics training?

CRM platform owners, sales operations staff, marketing automation specialists and service leads gain most. Insight analysts also benefit, since they measure whether scores change customer behaviour.

How does AI enhanced CRM and customer analytics differ from a general AI in marketing course?

It works inside the CRM record across sales, marketing and service rather than on advertising and content alone. You configure lead scores, churn triggers, next best actions and uplift tests on one customer portfolio.

What do you bring back from AI enhanced CRM and customer analytics training?

You bring back a CRM intelligence playbook for one customer portfolio. It sets scoring rules, churn triggers, next best actions, uplift tests and safeguards.

AI Enhanced CRM and Customer Analytics: The Way Forward

The CRM intelligence playbook informs the first commercial decision: which customers sellers and service agents contact first this quarter. Sales operations and service leads use it in weekly pipeline and retention meetings. After the first campaign cycle, revisit score calibration and the control group results, because customer behaviour shifts once offers and messages change.