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COURSE BROCHURE

Advanced Customer Relationship Management and Loyalty Strategy Course

16 – 27 August 2027
New York

Advanced Customer Relationship Management and Loyalty Strategy Course

Ref: 208_6348 **Date:** 16 – 27 August 2027 **Location:** New York **Fees:** 14000 GBP

Customer Relationship Management and Loyalty Strategy is a 2-week training course for relationship managers, CRM managers and customer strategy leads, who leave with a Customer Lifecycle and Loyalty Strategy for their organisation. Points schemes and discounts are easy to copy, so lasting loyalty now depends on how well an organisation manages each stage of the relationship. Jupiter Prime Training delivers Customer Relationship Management and Loyalty Strategy for these strategy owners.

Why Customer Relationship Management and Loyalty Strategy Matters Now

Three pressures reshape relationship strategy: competitors who match prices and rewards within weeks, customers who spread spending across several providers, and finance teams questioning the cost of loyalty schemes that reward purchases customers would have made anyway. Organisations that plan relationships by lifecycle stage earn repeat business and referrals at lower cost; those that rely on blanket rewards train customers to wait for the next offer. The course rests on customer lifetime value CLV modelling, the Identify, Differentiate, Interact and Customise IDIC model, and the ladder of loyalty from prospect to advocate.

Who Gains Most from Customer Relationship Management and Loyalty Strategy

- Relationship owners who decide how customers are welcomed, developed and kept
- CRM managers who translate lifecycle strategy into journeys, triggers and contact rules
- Loyalty scheme managers who set earn and burn rules, tiers and partner rewards
- Customer strategy leads who balance acquisition, development and retention budgets
- Sales and service heads whose teams deliver relationship moments in person

Organisations that send a loyalty scheme manager with a sales or service head gain most, because reward design and the human side of relationships are then planned together.

Customer Relationship Management and Loyalty Strategy Capabilities

Participants practise shaping every stage of the customer relationship so that loyalty comes from value received rather than from discounts alone.

- Design a lifecycle map with goals and triggers for each relationship stage — CRM managers
- Calculate customer lifetime value and acquisition payback by segment — finance partners
- Weigh loyalty scheme options using breakage, liability and incremental spend — loyalty committees
- Build welcome, development and win-back journeys with contact frequency rules — marketing leads

- Specify retention measures that separate true loyalty from inertia — customer strategy leads
- Align sales, service and marketing roles across relationship moments — executive sponsors

Key Customer Relationship Management and Loyalty Strategy Terms

- Customer lifecycle — the stages a relationship passes through, from awareness and first purchase to growth, loyalty and possible lapse.
- Customer lifetime value CLV — the projected net value a customer brings across the whole relationship.
- IDIC model — a relationship approach to identify customers, differentiate them, interact with them and customise treatment.
- Breakage — loyalty points or rewards earned but never redeemed, which affects scheme cost and customer perception.
- Incremental spend — purchases caused by a loyalty initiative rather than those customers would have made anyway.
- Win-back journey — a planned sequence of contacts aimed at reactivating customers who have lapsed.

Customer Relationship Management and Loyalty Strategy Day by Day

Day 1: Relationship Economics

- Customer Lifetime Value Modelling — Margin, Tenure and Discount Rates
- Acquisition Cost and Payback Periods — When New Customers Become Profitable
- Ladder of Loyalty — From Prospect to Advocate
- Behavioural Versus Attitudinal Loyalty — Telling Habit From Preference
- Relationship Strategy Statement — Choosing Where to Compete on Loyalty

Day 2: Lifecycle Stage Planning

- Customer Lifecycle Mapping — Stages, Goals and Exit Points
- IDIC Model Application — Identify, Differentiate, Interact, Customise
- Stage Transition Triggers — Events That Move Customers Forward
- Lifecycle Segmentation Grid — Value Tier Against Relationship Stage
- Contact Strategy per Stage — Channels, Frequency and Tone

Day 3: Onboarding and Early Relationship

- Welcome Journey Design — First Ninety Days of the Relationship
- Early Value Moments — Getting Customers to First Success
- Second Purchase Drivers — Converting Trial Into Habit
- Preference Capture at Onboarding — Asking Only What Will Be Used
- Onboarding Drop-Out Analysis — Why New Customers Go Quiet

Day 4: Developing the Relationship

- Next-Best-Action Rules — Choosing the Right Contact for Each Customer
- Bundling and Product Ladders — Growing Relationships Through Relevance
- Personalisation Logic — Data Signals Behind Tailored Offers
- Relationship Manager Portfolios — Coverage for High-Value Customers
- Contact Fatigue Controls — Frequency Caps and Quiet Periods

Day 5: Loyalty Scheme Design

- Loyalty Scheme Archetypes — Points, Tiers, Paid Membership and Coalitions
- Earn and Burn Rules — Making Rewards Reachable and Affordable
- Tier Qualification Criteria — Status Benefits That Customers Value
- Experiential and Recognition Rewards — Beyond Discounts
- Partner Reward Networks — Shared Schemes and Their Trade-Offs

Day 6: Loyalty Economics and Measurement

- Scheme Liability and Breakage Accounting — Cost Exposure Over Time
- Incremental Spend Testing — Control Groups and Matched Customers
- Reward Cost Ratio Tracking — Scheme Cost Against Member Margin
- Member Versus Non-Member Comparisons — Avoiding Selection Bias
- Scheme Health Indicators — Active Members, Redemption and Engagement

Day 7: Retention and Win-Back

- Lapse Definitions by Category — When a Customer Counts as Lost
- Attrition Early Warning Signals — Declining Frequency and Basket Size
- Save Offers and Their Limits — Retaining Without Training Customers
- Win-Back Journey Design — Reactivating Lapsed Customers
- Exit Surveys and Lost-Customer Interviews — Learning From Departures

Day 8: Aligning Sales, Service and Marketing

- Relationship Ownership Model — Who Leads at Each Stage
- Shared Customer Goals Across Functions — Joint Targets and Incentives
- Service Moments in Loyalty Strategy — Complaints as Relationship Tests
- Frontline Recognition of Loyal Customers — Visible Status in Every Channel
- Relationship Governance Forums — Monthly Decisions on Customer Priorities

Day 9: Sector Lessons in Loyalty

- Airline and Hotel Tier Schemes — Status, Partners and Liability
- Retail Grocery Loyalty — Personalised Offers From Basket Data
- Retail Banking Relationship Pricing — Rewards for Product Depth
- Telecoms Retention Desks — Contract Renewal and Upgrade Timing
- Subscription Services — Engagement Habits That Prevent Cancellation

Day 10: Practising the Customer Lifecycle and Loyalty Strategy

- CLV Baseline by Segment — Applying Day 1 Models to Own Data
- Lifecycle Map Validation — Day 2 Stages With Peer Challenge
- Loyalty Option Comparison — Day 5 Designs Against Day 6 Economics
- Retention Measures Selection — Day 7 Signals for Monthly Tracking
- Customer Lifecycle and Loyalty Strategy — Stages, Journeys, Scheme and Owners

Applying Customer Relationship Management and Loyalty Strategy After the Course

- Calculate customer lifetime value for three segments and present how acquisition and retention budgets would shift if the figures were used.
- Run an incremental spend test on one loyalty reward, comparing members who received it with a matched control group.

Customer Relationship Management and Loyalty Strategy Questions FAQ

What is customer relationship management and loyalty strategy, and why does it matter now?

It is the planning of how an organisation wins, develops and keeps customers across the lifecycle. It matters now because rewards are easily copied, customers split spending across providers and finance teams expect loyalty schemes to prove incremental value.

Which roles gain most from customer relationship management and loyalty strategy training?

Relationship managers, CRM managers and customer strategy leads gain most. Loyalty scheme managers and sales or service heads also benefit, because they design rewards and deliver the personal moments that decide whether customers stay.

How does customer relationship management and loyalty strategy differ from a CRM systems course?

It decides what relationships should achieve rather than how software is configured. A CRM systems course covers platforms, data models and automation; here you set lifecycle goals, loyalty economics, journeys and cross-functional ownership that any system then supports.

What do you bring back from customer relationship management and loyalty strategy training?

You bring back a lifecycle and loyalty strategy for your organisation. It holds CLV baselines, a validated lifecycle map, a costed loyalty scheme option, retention measures and named owners for each relationship stage.

Customer Relationship Management and Loyalty Strategy: The Way Forward

The Customer Lifecycle and Loyalty Strategy first informs how next year's budget splits between acquisition, development and retention. Customer strategy leads, CRM managers and loyalty scheme owners use it to agree journeys and reward rules. After its first use, revisit the incremental spend results, because they show which rewards change behaviour and which simply cost money.