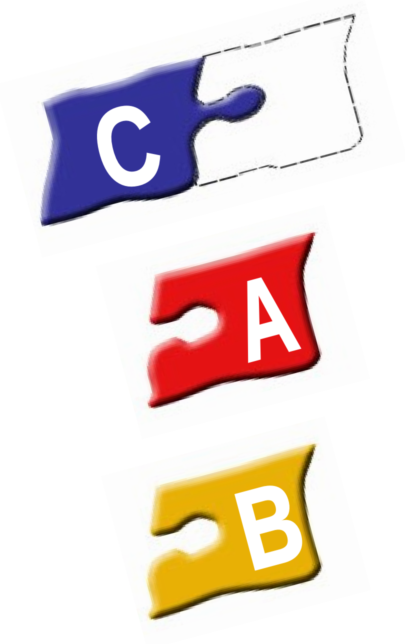
Customer Relationship Management

# Evaluation

## Certificate Training Program




**Core Module**
C1. Customer Value Management
C2. CRM Vision & Strategy
C3. Customer Loyalty & Satisfaction

**Elective Module A**
A1. Customer Experience Management
A2. CRM Communication & Marketing Integration
A3. Customer Data Management

**Elective Module B**
B1. Technology Selection & Implementation
B2. Contact Center Strategy
B3. Web Analytics

March 28~29, 2006
Shanghai International Convention Center

*Designed & Delivered by Global CRM Experts from* **13**

*North America, Europe, Asia Pacific & Greater China*

GCCRM
evaluation. best practices.

# Program Description

The CRM Evaluation Certificate Program is designed and delivered by 13 global CRM experts from North America, Europe, Asia Pacific and Greater China. This 2-day course applies CRM essentials, strategies and evaluation on Marketing, Sales & Service, and equips attendant's knowledge to immediately apply to their business.

Organized by

GCCRM

BPT PARTNERS

Certificate Endorsed By

GCCRM

BPT PARTNERS

CRMguru.com

WAA Web Analytics Association

CFIP

中国信息化推进联盟客户关系管理专业委员会

Ministry of Information Industry, China

## What You Will Learn

The learning objectives of The CRM Evaluation Certificate Program are:

- To enable attendants to learn all the essentials of success customer relationship management
- To enable attendants to plan and implement effective customer relationship management strategies
- To enable attendants to evaluate the five key sectors of customer relationship management: [Customer], [Strategy], [People], [Process] and [Technology]


## Who Should Attend

This training program is designed for a class of 10-20 attendants:

- Executives, Managers of Marketing, Sales and Service
- Responsible persons for customer relationship management initiatives
- Project Managers, Analysts, Consultants

## How to Get the Certificate

Students are required to attend and pass THREE Core Modules and THREE Elective Modules (either Module A or B), i.e. a total of SIX modules in order to get the program certificate.

| | | |
|---|---|---|
| C | 3 Core Module | C1. Customer Value Management<br>C2. CRM Vision & Strategy<br>C3. Customer Loyalty & Satisfaction |
| A | 3 Elective Module A | A1. Customer Experience Management<br>A2. CRM Communication & Marketing Integration<br>A3. Customer Data Management |
| B | 3 Elective Module B | B1. Technology Selection & Implementation<br>B2. Contact Center Strategy<br>B3. Web Analytics |

Option A C A

Option B C B

The certificate will be given to attendees who successfully completed and pass the 2-day training session (3 Core Modules and 3 Elective Modules) with the corresponding assignments of six modules, and one final examination.

# C1. Customer Value Management

Core

## Description

Analyzes customers and the value they have to an organization. The module takes a comprehensive perspective of determining the value of the customer and measures the ROL of CRM initiatives at an individual and customer level.

Sampson Lee

Trainer

## Learning Objectives

- To enable the student to determine the value of a customer relationship from the customer's point of view and the company's point of view.
- To enable the student to calculate net present value of a customer.
- To enable the student to apply a framework to understand value from the customer's perspective.
- To enable the student to identify groups of customers from which to create customer relationship strategies.

## Content Sequence

The program content is sequenced as follows:

| | |
|---|---|
| The Delta Principle | ◆ Customer Satisfaction, Experience & Expectation<br>◆ Total Spend & Customer Share<br>◆ Relationship between Loyalty & Satisfaction |
| The Customer Pyramid | ◆ Top 5 Observations in Europe & Greater China<br>◆ Different Types of Customer Pyramids<br>◆ Build Your Own Pyramid(s) |
| The LV Quadrant | ◆ Define Your Best (Target) Customers<br>◆ Segmentation by Customer Loyalty & Value<br>◆ Applications of The LV Quadrant |
| Customer Value Factors | ◆ Monetary<br>◆ Customer Profile<br>◆ Customer Profitability<br>◆ CLV (Customer Lifetime Value) |
| Customer Loyalty Factors | ◆ Transactional Loyalty<br>◆ Emotional Loyalty<br>◆ Satisfaction Level<br>◆ Competition Level |

# C2 . CRM Vision & Strategy

Core

## Description

As a Japanese proverb says " Vision without action is day-dreaming; Actions without a vision is nightmare", thus the CRM Vision and Strategy module aims to equip you with a holistic approach to defining a CRM vision that supports your corporate values and appropriate customer strategies that would bring your vision to life.


Candice Ng-Chee

Trainer

## Learning Objectives

Through sharing of tested concepts, research works, consulting and best practices, as a key stakeholder of your organization, you will acquire the skills to developing a sound CRM Blueprint especially in:

- The critical thinking process of how to lead the company on the CRM expedition;
- The formulation of effective customer-centric strategies using key elements of successful CRM practices

## Content Sequence

The program content is sequenced as follows:

| | |
|---|---|
| Choosing Your Strategic Discipline | ◆ What are your strategic options?<br>◆ The CRM Blueprint<br>◆ The model for successful CRM |
| Defining Your CRM Vision | ◆ Difference between a Corporate and CRM Vision<br>◆ How to establish a Customer-centric Vision<br>◆ Applications and implications |
| Developing CRM Strategy | ◆ Customers as foundation<br>◆ Goals setting<br>◆ Customer-based business strategies |
| Enabling CRM Strategy | ◆ Organizational capabilities<br>◆ Customer management<br>◆ Customer-centric processes |
| Implementing CRM Strategy | ◆ Actionable customer insights<br>◆ Equipping People & an Empowering Culture<br>◆ Customer-based performance measurements |

# C3. Customer Loyalty & Satisfaction

Core

## Description

In this session, you will learn how to design, implement, and manage customer satisfaction and loyalty surveys and programs for your organization that let you recognize and save at-risk customers and the revenue they represent; build customer loyalty and recurring revenues; coordinate and drive enterprise-wide action responding to customer feedback; better prioritize investments; and strengthen bottom-line profitability and strategic advantage.

John Chisholm

Trainer

## Learning Objectives

- Understand the benefits and challenges of measuring, analyzing, reporting, and driving action on customer satisfaction and loyalty for your organization
- Discover how to manage and analyze customer feedback to: pinpoint customer concerns and market opportunities; save at-risk customers and recurring revenue; and better prioritize investments in corporate infrastructure
- Learn how to design and implement customer satisfaction and loyalty surveys and programs in your organization

## Content Sequence

The program content is sequenced as follows:

| | |
|---|---|
| Overview to Customer Satisfaction & Loyalty | ◆ Attitudes and Behaviors / Satisfaction, Retention, Advocacy, Loyalty<br>◆ Impact of Loyalty on Profitability / The Customer Feedback Process<br>◆ Customer Experience Management (CEM) vs. CRM<br>◆ Relationship vs. Transactional Feedback<br>◆ Survey Structure: Drivers, Objectives, Segments |
| Analyzing, Reporting, and Driving Action on Survey Results | *Analysis*<br>◆ Mean scores, Top-N box, Bottom-N box / Customer Satisfaction Indices<br>◆ Cross-tabs / Statistical significance / Filters / Trend lines<br>◆ Open-ended comments and suggestions<br>◆ Quadrant charts / Positioning charts<br>*Reporting*<br>◆ Real-time Alerts<br>◆ Opening and Assigning Cases from Customer Feedback. |
| Designing Effective Questionnaires | ◆ Determining the Right Questions to Ask.<br>◆ Asking Questions the Right Way |
| Inviting Customers to Respond | ◆ By mail, phone or email / Reminders, Incentives, and Acknowledgements<br>◆ Maximizing response rates |
| Integrating Feedback from Multiple Channels | ◆ Phone / Online / IVR and Speech-enabled IVR<br>◆ Paper questionnaires / PDA |
| Automating Customer Feedback through IT Integration | ◆ Integrating with CRM Systems and Customer Databases<br>◆ Integrating with Web Sites<br>◆ Integrating with Back-end Enterprise Applications |
| Multinational Customer Feedback | ◆ Language and other special issues |



GCCRM

# A1. Customer Experience Management

A Elective

## Description

This module equips you the fundamentals to understand the real needs of your target customers and maximize their satisfaction. It also provides the know-how and tools to design, implement and manage the optimal branded customer experience.

Sampson Lee

Trainer

## Learning Objectives

The learning objectives for the module on Customer Experience Management are:

- To understand the real needs and the buying impulses of your target customers
- To design and map your own multi-channel customer touch-points
- To learn and apply the CEM method to design the best customer experience
- To optimize your CEM via alignment of business strategies, customers' needs and enterprise's capabilities

## Content Sequence

The program content is sequenced as follows:

| | |
|---|---|
| Customer Insight | ◆ The problems and limitations of customer surveys and focus groups<br>◆ Understand the real needs of your target customers<br>◆ How customers make decisions to buy, and buy again<br>◆ Convert customer insights into deliverables |
| Branded Customer Touch - Points | ◆ The quantified costs of negative customer experiences & potential impact on revenues<br>◆ Brand positioning & brand promise<br>◆ Experiencing the brand and branding the experience<br>◆ Map your own multi-channel customer touch - points |
| The CEM Method | ◆ Confirm perceived brand values & image<br>◆ Understand current experience & expectation, identify critical experiences<br>◆ Gap analysis on desired & actual critical experiences, map requirements to fill the gaps<br>◆ Align requirements with strategy, people, process & technology<br>◆ Feedback mechanism for continuous improvements |
| CEM Optimization | ◆ Shaping a unified brand experience<br>◆ Organization & people requirements for CEM<br>◆ The optimal level of customer - centricity<br>◆ Alignment of business strategies, customers' needs and enterprise's capabilities |

# A2. CRM Communication & Marketing Integration

A Elective

## Description

Provides a primer about direct marketing communications techniques, as requested by a CRM program. It also describes how to integrate a CRM program into your marketing programs and investments. Outlines the basis of direct marketing communications, customer service communications and online communications. Offers practical advices for either developing in-house capabilities or using external services like direct marketing agencies.

Marco De Veglia

Trainer

## Learning Objectives

<u>The learning objectives for the module on CRM Communications & Marketing Integration are:</u>

- To enable participants to define the communications structure and components of a CRM program
- To understand how to integrate CRM activities into a marketing plan
- To develop basic skills for creating/evaluating CRM communications

## Content Sequence

The program content is sequenced as follows:

| | |
|---|---|
| Direct Marketing, the basis of CRM communication | ◆ What is Direct Marketing and why it is important for CRM<br>◆ A primer on Direct Marketing techniques<br>◆ How companies benefit from using customer information effectively |
| The role of technology in CRM communications | ◆ The key role of Internet as a channel<br>◆ Using data for better communications<br>◆ Marketing automation |
| What the R in CRM means | ◆ Relationship means interaction<br>◆ The role of surveys and customer feedback<br>◆ How relationship makes money |
| How to integrate CRM in your marketing | ◆ Evaluating your CRM interaction channels<br>◆ Mixing branding and interaction in CRM communications<br>◆ Defining a budget allocation strategy |
| Summary | ◆ How to communicate for CRM<br>◆ Managing interaction effectively<br>◆ Integrating CRM activities in your marketing |

# A3. Customer Data Management

A Elective

## Description

Provides a basic knowledge of customer information flow in organizations.  Describes methods for collecting and storing customer data and reviews the types of customer data available for use. Outlines the major types of data analysis and links these to uses of data in pre-purchase/consumption (marketing), at-purchase/consumption (sales) and post-purchase/consumption (service.) Offers practical rather than technical information using real world examples.

Ro King

Trainer

## Learning Objectives

The learning objectives for the module on Customer Data Management are:

- To enable participants to describe an end-to-end CRM information infrastructure from collection and storage to analysis and use
- To define relevant technical terminology
- To develop an understanding of the importance of a single, integrated view of the customer

## Content Sequence

The program content  is sequenced as follows:

| | |
|---|---|
| The Circle of Data | ◆ Case Study:  How learning to use customer data produced cost savings and profits<br>◆ Why is customer information important to CRM<br>◆ How companies benefit from using customer information effectively |
| CRM Information Infrastructure | ◆ Where does customer data come from and where does it go<br>◆ Defining a CRM Data Warehouse<br>◆ Integrating customer data on a data warehouse |
| Customer Data Analysis | ◆ Business intelligence and reporting<br>◆ Data mining in CRM<br>◆ Analytics made famous on the Web: clickstream, personalization and collaborative filtering |
| Effective Use of Customer Data | ◆ Customer information flows to and from marketing<br>◆ Customer information flows to and from sales<br>◆ Customer information flows to and from customer service |
| Summary | ◆ Using customer information more effectively in your firm<br>◆ What to do with customer data when you get back to your office<br>◆ Overcoming obstacles to effective customer information use within your firm |

# B1. Technology Selection & Implementation

B Elective

## Description

Provides a blueprint for selecting and implementing CRM software tools. Describes a structured selection process used by many successful firms who have purchased CRM technology. Outlines the implementation process used by leading software vendors and consultants. Offers practical information using real world examples.

Ro King

Trainer

## Learning Objectives

The learning objectives for the module on Technology Selection & Implementation are:

- To enable participants to lead or participate in a CRM Technology Selection process
- To define the steps of Technology Selection and Implementation projects
- To develop an understanding of the obstacles to successful technology implementation

## Content Sequence

The program content is sequenced as follows:

| | |
|---|---|
| The Five Step Selection Process | ◆ Case Study: How using the 5-step selection process saves time and lowers expenses<br>◆ Planning: Understanding business and technical needs<br>◆ RFI: Using the Request for Information to understand alternatives<br>◆ RFP: Designing a selection matrix and developing scenarios for the Request for Proposal<br>◆ Selection: Weightings, ratings and reference checks<br>◆ Contract: Negotiating vendor contracts and maintaining your business case |
| Key Success Factors for Technology Selection | ◆ Building the Business Case and Sticking to It<br>◆ Exploring the Advantages and Disadvantages of Outsourcing the Process<br>◆ Setting Appropriate Selection Timelines |
| The Five Step Implementation Process | ◆ Case Study: How using the 5-step implementation process saves time and lowers expenses<br>◆ Infrastructure Assessment: Reviewing the technical environment, business processes and existing skill sets<br>◆ Installation: Installing, customizing and documenting the software<br>◆ Incorporation: Redesigning processes and educating staff<br>◆ Initiation: Sharing best practices and implementing new skills<br>◆ On-going Initiatives: Maintaining the technology, improving business processes and upgrading skills |
| Key Success Factors for Technology Implementation | ◆ Setting Appropriate Implementation Milestones and Measurements<br>◆ Keeping the Users in the Loop<br>◆ Communicating Progress, Obstacles and Successes |

# B2. Contact Center Strategy

B Elective

## Description

The contact center is one of the most technically sophisticated and complex operating environments in your enterprise. When built and managed properly, the contact center can be a great strategic asset. Optimizing its performance and benefits for your company, customers and staff requires a thorough knowledge of world-class strategies, tactics, systems and best practices. This four-hour course will provide you with a strategic understanding of the core components for building and managing a world-class contact center.

Donna Fluss

Trainer

## Learning Objectives

- Explain how a contact center can be a strategic value-added asset
- Provide a working knowledge of the different technologies and applications used in contact centers
- Present a strategy and process for making the right technology choices
- Formulate best practices for staffing, managing and leading contact centers
- Develop a project plan for building a world-class contact center

## Content Sequence

The program content is sequenced as follows:

| | |
|---|---|
| Module One: Contact Center Fundamentals | ◆ Contact center historical overview<br>◆ Types and purposes of contact centers<br>◆ Determining if a contact center is right for your organization<br>◆ Identifying contact center benefits |
| Module Two: Contact Center Technology and Applications | ◆ Review of technology and applications required in world-class contact centers<br>◆ Core systems<br>◆ Supporting systems<br>◆ Management systems<br>◆ Front and back office applications<br>◆ Enabling/common applications<br>◆ Strategy and process for selecting the right tools for your contact center |
| Module Three: Contact Center Management Strategies and Tactics | ◆ Organizing and staffing contact centers<br>◆ Common contact center job descriptions<br>◆ Hiring best practices<br>◆ Training<br>◆ Agent performance evaluations<br>◆ Contact center metrics<br>◆ Contact center leadership requirements |
| Module Four: Building World-Class Contact Centers | ◆ Defining world-class service<br>◆ Steps for building a world-class contact center<br>◆ Resources for building world-class contact centers |

# B3. Web Analytics

B Elective

## Description

Your website is serving pages, but how well it is serving your customers or your company? This half-day session introduces the wide variety of data that can be collected from a website in order to illuminate what can be measured. This module covers the spectrum of measurements from attracting attention to your website to measuring conversion rates. We will focus on how web analytics helps you assess how well your site is achieving its business goals.

Jim Sterne

Trainer

## Learning Objectives

- Understand what *can* be measured in order to determine what *should* be measured
- Recognize the difference between various measurement techniques
- Learn how to optimize website processes for increased return on investment
- Discover how to measure the impact of incremental changes on customer relationships and satisfaction
- Measure the impact of your online and offline advertising
- Gauge the effect of website navigational changes
- Inspect the status of your sales life cycle
- Determine the value of online customer service
- Appraise the value of altering your marketing message
- Deal with the inherent inaccuracy of Web data
- Spread enthusiasm for Web analytics in your company
- Inject Web metrics into the business decision process

## Content Sequence

The program content is sequenced as follows:

| | |
|---|---|
| Web Analytics Data Sources | ◆ Performance monitors / Server logs / Referrer logs<br>◆ URL tagging / Cookies / Packet sniffing / Web bugs / Page tagging<br>◆ Client-side surveillance / Application servers / Panel research<br>◆ Usability testing / Browser counting / Eye tracking / Brand impact |
| Using Web Data For Business | ◆ Attention / Navigation / Content<br>◆ Conversion / Customer experience / Email marketing<br>◆ Loyalty and retention |
| Rolling Out A Web Analytics Project | ◆ Who needs to see which web analytics reports?<br>◆ Roles and responsibilities - required skills<br>◆ Culture of accountability - change management |
| Lessons from the front | ◆ Best practices and worst practices |

# Agenda

## Option A:

| Day 1 March 28th, 2006 | | Day 2 March 29th, 2006 | |
|---|---|---|---|
| 09:00-10:00 | Customer Value Management<br>Trainer: Sampson Lee  | 09:00-10:00 | Customer Experience Management<br>Trainer: Sampson Lee  |
| 10:00-10:15 | Morning Coffee | 10:00-10:15 | Morning Coffee |
| 10:15-11:15 | Customer Value Management<br>Trainer: Sampson Lee  | 10:15-11:15 | Customer Experience Management<br>Trainer: Sampson Lee  |
| 11:15-11:30 | Morning Coffee | 11:15-11:30 | Morning Coffee |
| 11:30-12:30 | CRM Vision & Strategy<br>Trainer: Candice Ng-Chee  | 11:30-12:30 | CRM Communication & Marketing Integration<br>Trainer: Marco De Veglia  |
| 12:30-13:30 | Luncheon | 12:30-13:30 | Luncheon |
| 13:30-14:30 | CRM Vision & Strategy<br>Trainer: Candice Ng-Chee  | 13:30-14:30 | CRM Communication & Marketing Integration<br>Trainer: Marco De Veglia  |
| 14:30-14:45 | Afternoon Coffee | 14:30-14:45 | Afternoon Coffee |
| 14:45-15:45 | Customer Loyalty & Satisfaction<br>Trainer: John Chisholm  | 14:45-15:45 | Customer Data Management<br>Trainer: Ro King  |
| 15:45-16:00 | Afternoon Coffee | 15:45-16:00 | Afternoon Coffee |
| 16:00-17:00 | Customer Loyalty & Satisfaction<br>Trainer: John Chisholm  | 16:00-17:00 | Customer Data Management<br>Trainer: Ro King  |

# Agenda

## Option B:

| Day 1 March 28th, 2006 | | Day 2 March 29th, 2006 | |
|---|---|---|---|
| 09:00-10:00 | Customer<br>Value Management<br>Trainer: Sampson Lee  | 09:00-10:00 | Technology Selection<br>& Implementation<br>Trainer: Ro King  |
| 10:00-10:15 | Morning Coffee | 10:00-10:15 | Morning Coffee |
| 10:15-11:15 | Customer<br>Value Management<br>Trainer: Sampson Lee  | 10:15-11:15 | Technology Selection<br>& Implementation<br>Trainer: Ro King  |
| 11:15-11:30 | Morning Coffee | 11:15-11:30 | Morning Coffee |
| 11:30-12:30 | CRM<br>Vision & Strategy<br>Trainer: Candice Ng-Chee  | 11:30-12:30 | Contact Center Strategy<br>Trainer: Donna Fluss  |
| 12:30-13:30 | Luncheon | 12:30-13:30 | Luncheon |
| 13:30-14:30 | CRM<br>Vision & Strategy<br>Trainer: Candice Ng-Chee  | 13:30-14:30 | Contact Center Strategy<br>Trainer: Donna Fluss  |
| 14:30-14:45 | Afternoon Coffee | 14:30-14:45 | Afternoon Coffee |
| 14:45-15:45 | Customer<br>Loyalty & Satisfaction<br>Trainer: John Chisholm  | 14:45-15:45 | Web Analytics<br>Trainer: Jim Sterne  |
| 15:45-16:00 | Afternoon Coffee | 15:45-16:00 | Afternoon Coffee |
| 16:00-17:00 | Customer<br>Loyalty & Satisfaction<br>Trainer: John Chisholm  | 16:00-17:00 | Web Analytics<br>Trainer: Jim Sterne  |

# About Organizers

## Vision

ROADMAP CRM BEST PRACTICE through the collaboration of global intelligence on evaluation and benchmarking.

GCCRM is an independent CRM evaluation organization founded in 2001. Through evaluation, enhancement and benchmark with best practices, GCCRM helps to roadmap organizations' CRM - where they are, where to go and how to get there. GCCRM preaches the belief of "CRM Success Beyond Software" via awards, methodology, research & portal.

## GCCRM Associates

GCCRM Associates is formed by 13 world famous CRM gurus from North America, Latin America, Europe, Asia Pacific and Greater China. They contribute to the development of CRM evaluation method - CRMBodyCheck, and conduct CRM training programs on evaluation and enhancement for the enterprises in Asia Pacific region.

BPT Partners is a leading provider of CRM training, education and research. With offices in Atlanta, Dallas and Washington, D.C., and partnerships that span the globe, BPT Partners can provide full-service CRM training from executive education on CRM strategy to "Best Practices" training in the areas of sales, marketing and customer support. BPT Partners provides CRM training in both the cutting edge and the classic strategies and processes that made CRM one of the most successful business approaches in decades. BPT's trainers and subject matter experts are notable professionals who have won awards for their industry leading thinking and practices.

Founded in January 2000 by Bob Thompson, CRMGuru.com has grown rapidly to become the world's largest CRM community. Its mission is to help marketing, sales and service executives succeed with Customer Relationship Management (CRM), through high-quality and unbiased articles, discussions, newsletters and online events; interactions with CRMGuru panelists; insightful industry benchmark reports; and an annual thought-leader Summit . CRMGuru.com serves over 100,000 visitors per month and distributes opt-in email newsletters to 200,000 active members worldwide.

"The Web Analytics Association unites and fosters the interests of industry practitioners, vendors, consultants and educators who use, sell, install, implement, consult, teach or train in the filed of web analytics. Our members enjoy several benefits, and several types of membership options. Academics, Professionals, and several types of Corporate Memberships, we invite everyone who has a vested interest in the field of web analytics to participate!"

# All Program Trainers

### Sampson Lee (China)

Founded GCCRM in 2001 and co-founded The 3C Method (China Customer Care) in 2002. GCCRM is an independent CRM evaluation organization. Through evaluation, enhancement and benchmark with best practices, GCCRM helps to roadmap organizations' CRM. Sampson provides training and consulting to first tier multi-national companies and leading conglomerates in Greater China region including Lenovo Group, Kodak, FedEx, Bertelsmann Group, Wyeth, Siemens Mobile Communications. He speaks for many C-Level Forums and events on the topics of CRM Evaluation and Benchmarking and also Best CRM Practice in China. Sampson is the Visiting Lecturer of the HK University master degree program (customer relationship management module).

### Paul Greenberg (US)

In addition to being the author of the best-selling CRM at the Speed of Light: Essential Customer Strategies for the 21st Century, Paul Greenberg is President of The 56 Group, LLC, an enterprise applications consulting services firm, focused on CRM strategic services and Chief Customer Officer of BPT Partners, LLC, the U.S.'s leading CRM training organization. He is considered one of CRM's leading authorities on strategy, and is the co-chairman of the newly created CRM Research Center at Rutgers University and is the Executive Vice and President of the CRM Association, U.S.

### Jennifer Kirkby (UK)

She is an independent analyst and practitioner in "state of the art" marketing and customer management practices. She is a professional presenter, post graduate lecturer and author, described by peers as one of the leading independent CRM consultants and writers in EMEA. Currently Director of White Waves Ltd, she was formerly CRM Research Director for Gartner, where she was a primary architect of the Classic Gartner Model - The Eight Building Blocks of CRM. She has advised many Fortune 500 companies across Europe and Asia on how to improve their customer management over the last 5 years.

### Donna Fluss (US)

Donna is the Principal of DMG Consulting LLC, specializing in customer-focused business strategy, operations and technology for Global 2000 and emerging companies such as PeopleSoft, Nortel Networks, RealNetworks. With more than 20 years experience in CRM and contact centers, Ms. Fluss is a recognized leader and visionary in all areas of CRM and a highly sought after writer and speaker. Ms. Fluss was a Vice President and Research Director in the CRM practice area at Gartner, where she consulted with more than 3000 clients and published more than 125 research reports.
Ms. Fluss also held senior management positions at Chase Manhattan Bank.

### Paul Ward (US)

Paul Ward provides business management and web services consulting to global and domestic companies and non-profits. He has created digital strategies for the Screen Actors Guild (SAG) and the Association of Motion Picture and Television Producers (AMPTP), and created web sites enforcing the Digital Millennium Copyright Act's coverage of film properties internationally. A former senior consultant for USWeb/CKS, Paul has worked on web services and marketing strategies for national and global product roll-outs, working with companies ranging from Philips NV and Apple Computer to Jean-Michel Cousteau and the Estate of Isaac Asimov. Recent clients include governance service provider Axentis, the Department of Commerce's Commercial Law Development Program (CDLP), the International Society of Pharmaceutical Engineers and Bill Clinton's Global Fairness Initiative (GFI).

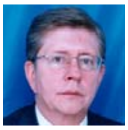
### John Chisholm (US)

John Chisholm is Chairman and CEO of CustomerSat, the leading provider of real-time systems for measuring and automating actions based on customer satisfaction and loyalty. Prior to founding CustomerSat in 1997, he founded and served as CEO of Decisive Technology, formerly the leading provider of desktop software for conducting online surveys (acquired by MessageMedia). John has nearly three decades of experience in general management, marketing/research, and strategy, including positions at Hewlett Packard, Xerox, Pyramid Technology, and Grid Systems. He holds a US patent in Internet polling technology; bachelors and masters degrees in electrical engineering and computer science from MIT; and an MBA from Harvard Business School. He serves as chairman of the Stanford Institute for the Quantitative Study of Society (SIQSS), sits on the market research council of the Association for Interactive Media (AIM) and on numerous advisory boards.

# All Program Trainers

### Jim Sterne (US)

Jim Sterne has spent more than 20 years selling and marketing technical products and produced the world's first "Marketing on the Internet" seminar series in 1994 and has since devoted all of his attention to the Internet as a marketing medium.Today, Sterne is an internationally known speaker on electronic marketing and customer interaction and a consultant to Fortune 500 companies and Internet entrepreneurs. Sterne focuses his twenty years in sales and marketing on measuring the value of a Web site as a medium for creating and strengthening customer relationships.



### Rafael Rodriguez (Colombia)

Rafael is a business and a technology executive with extensive experience in leading people, project teams and businesses. He began his consulting career after 25 years of work in the Media, Telecommunications, Commercial, International and Public sectors where he held important managerial and technical positions. Rafael combines his management expertise with a deep knowledge and understanding of technology derived from his leadership roles in implementing SAP, JD Edwards, Oracle Financials, Sales Logix and many other solutions.

### Mei Lin Fung (US)

Mei Lin Fung was an early pioneer in the CRM space, and was the business analyst for the first integrated sales and marketing application, envisioned by Tom Siebel at Oracle in 1988. Mei Lin spent 5 years at Intel, primarily as a customer marketing engineer in the US Distribution Sales Channel. The combination of Intel and Oracle has given her an insider's view of the supply chain through to demand chain connection in the technology industry. She was Managing Director at Wainscott Venture Partners, an IT-focused venture capital company with offices in Washington DC, New York, and the Silicon Valley, until 2001. Mei Lin advocates the discipline of Customer Lifetime Value analysis to achieve successful CRM investments and sustainable business models.

### Candice Chee (Singapore)

A Consultant and Marketer by profession, Candice founded MetaCore Asia with a team of like-minded professionals dedicated to building best-in-class customer-based marketing strategies for companies in Asia. She has had intensive hands-on experience in the conceptualization, integration and management of Database, Direct Marketing, Integrated Marketing Communications, Loyalty Marketing, Internet Marketing, Customer Relationship Marketing/Management, and One-to-One Marketing initiatives. She has been instrumental in creating customer value for many MNCs and Fortune 500 companies in the FSI, Healthcare, Retail, Hospitality, Services and Automobile verticals.

### Marco De Veglia (Italy)

Marco has worked in marketing communications since 1990, both inside international advertising agencies and as a consultant on the integration of traditional and digital marketing. In 2001 he founded the CRM Group, group of affiliate professionals offering CRM consulting and services to Italian companies.

### Ro King (US)

Brings to client engagements more than 15 years of experience in the areas of direct marketing, customer contact management, and strategic planning. Ro guides Fortune 500 and Internet 100 firms in building databases of customer information, analyzing data to better understand and anticipate customer behavior, and implementing the tools and processes to conduct marketing campaigns that integrate direct mail, call center, e-commerce, and direct sales channels. Ro's clients include foremost firms in financial services, hospitality, retail, and pharmaceuticals where her most recent work focuses on customer data strategy, direct marketing process redesign, and e-marketing and direct mail project planning with ROI justification.

### Simon Daisley (UK)

Simon Daisley is co-founder and Managing Director of Profusion International, a business development company that specialises in giving people more to celebrate. In the private sector Profusion helps to build customer loyalty, brand gravity, employee satisfaction and shareholder value. In the public sector, it applies this same experience to increase organisational efficiency and service quality. Profusion has worked with organisations such as BT, Ferrari, Royal Bank of Scotland, Debenhams, ANZ Bank and a number of leading public sector agencies including the UK's fastest improving local authority!

# Registration Form

## Contact Us


Shanghai
Tel: 8621-6351-4571
Fax: 8621-6351-2501

Hongkong
Tel: 852-2851-0356
Fax: 852-3078-1881

Email：training@gccrm. com


### YES! Please Register me for: ➤➤➤

| | |
|---|---|
| ❑ | Option A (Core Module & Elective Module A) |
| ❑ | Option B (Core Module & Elective Module B) |

### Delegate Fees (Please tick the options) ➤➤➤

| | | | |
|---|---|---|---|
| ❑ | Standard Price | USD2,000 | Attend 2-day Training |
| ❑ | Group Discount | USD1,800 | More than 3 delegates from same company |

### Company Info ➤➤➤

| | |
|---|---|
| Name | |
| Address | |
| Post Code | |

### Attendee details ➤➤➤

| | |
|---|---|
| Name | 1. |
| Position | |
| Phone | |
| Email | |
| Name | 2. |
| Position | |
| Phone | |
| Email | |
| Name | 3. |
| Position | |
| Phone | |
| Email | |

### Who recommends you for this training ➤➤➤

| | |
|---|---|
| Name | |
| Email | |

## Signature:

*I understand that all handouts and materials obtained in class are strictly for my own educational purposes. GCCRM owns the copyright rights of all program materials and no reproduction is allowed without the written consent of GCCRM*

### CECP — GCCRM

### Training Date & Venue ➤➤➤

March 28~29, 2006
Shanghai International Convention Center
Add: No. 2727 Riverside Avenue Pudong, Shanghai
Tel: 8621-5037-0000
Fax: 8621-5037-0999

### Method of Payment ➤➤➤

Payment should be made within 5 working days after registration confirmation and your place is ONLY secured on receipt of your payment. please fax your receipt to our
Shanghai office: 8621-6351-2501
Hongkong office: 852-3078-1881

**Payment on paypal.com**
*[ CECP-USD 1,800 before Feb.28th ]*
*[ CECP-USD 2,000 after Feb.28th ]*

**Bank Transfer: USD Account**
- Company: iMatchPoint Ltd
- Bank: Hong Kong and Shanghai Bank Corporation
- (Mongkok and Link Day & Night Banking)
- Bank Account: 004-534-233648-838
- Bank Address: 673 Nathan Road, Mongkok, Kln, Hong Kong

### Attention ➤➤➤

- Acceptance is subject to the discretion of program organizer
- Applicants will be requested to confirm the attendance and fax the payment slip.
- When a program is over-subscribed, additional classes may be opened. Applicants will be notified of the new time, dates and place of the program whenever applicable
- When a program is under-subscribed, original class may be cancelled. Full refund will be provided
- Participant(s) can assign delegate(s) to take up his / their seats should they be unable to attend the program. However, notification should be made to the program organizer at least 2 days prior to program commencement. No refund will be made should the participant(s) be unable to attend the program on his / their own accord.
- Applications, upon full payment, will be processed on a first-come first-served basis
- Personal data will be used for market research, program development and promotion purpose.
- Language: English.





GCCRM