

CRM & PRESENTATION SKILLS



GENTEX[®]
TRAINING CENTER



Introduction

Strong customer relationships and confident presentations drive business growth and client retention. Professionals who manage customer data effectively while communicating value persuasively gain a clear competitive advantage. This CRM & Presentation Skills Training Course equips participants with practical techniques to manage customer relationships using CRM systems and deliver compelling presentations to clients and stakeholders. Gentex Training Center designed this program for sales professionals, account managers, and client-facing staff who want to strengthen both technical and communication capabilities. Participants explore CRM data management, customer segmentation, and presentation design principles. Furthermore, the course builds confidence in structuring persuasive pitches, using visual aids effectively, and delivering presentations that convert prospects into loyal customers.

CRM & Presentation Skills Course Objectives

- Apply CRM systems to manage customer data and interactions
- Use customer segmentation techniques to target communications
- Structure presentations using the "tell, show, tell" framework
- Apply data visualization principles to present customer insights
- Design slides using consistent branding and visual hierarchy
- Use storytelling techniques to strengthen presentation impact
- Apply CRM pipeline tracking to monitor sales opportunities
- Practice handling objections during client presentations
- Use presentation software tools to enhance delivery
- Apply follow-up strategies using CRM automation features

Course Methodology



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- Hands-on CRM software exercises using sample customer data
- Presentation practice sessions with peer feedback
- Role-play exercises simulating client-facing scenarios
- Case study analysis of successful CRM strategies
- Slide design workshops using presentation software
- Video-recorded practice presentations for self-review

Who Should Take This Course

- Sales representatives and account managers
- Customer relationship and service professionals
- Marketing and business development staff
- Client-facing consultants and advisors
- Team leaders presenting to stakeholders
- Professionals seeking stronger CRM and presentation skills

CRM & Presentation Skills Course Outlines

Day 1: Foundations of CRM Systems

- Define CRM and its role in customer relationship management
- Explore key CRM features, including contact and pipeline tracking
- Apply customer segmentation techniques for targeted engagement
- Input and organize customer data within CRM platforms
- Distinguish between CRM types and their business applications
- Practice navigating a sample CRM dashboard
- Review case studies of effective CRM adoption





Day 2: Leveraging CRM for Customer Insights

- Apply CRM analytics to identify customer trends
- Use CRM pipeline tracking to monitor sales opportunities
- Structure customer profiles for personalized engagement
- Apply automation features for follow-up communications
- Practice generating CRM reports for decision making
- Identify upsell and cross-sell opportunities using CRM data
- Review data quality practices within CRM systems

Day 3: Foundations of Effective Presentations

- Apply the "tell, show, tell" presentation structure
- Identify audience needs to shape presentation content
- Use storytelling techniques to strengthen key messages
- Apply data visualization principles for clarity
- Structure presentations with clear openings and closings
- Practice organizing content into logical presentation flow
- Review examples of strong versus weak presentations

Day 4: Designing and Delivering Presentations

- Design slides using consistent branding and visual hierarchy
- Apply presentation software tools to enhance delivery
- Use body language and vocal techniques for confident delivery
- Practice handling questions and objections professionally
- Apply the rule of three for memorable key points

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- Rehearse presentations using peer feedback sessions
- Record and review practice presentations for improvement

Day 5: Client Presentations and CRM Integration

- Apply CRM customer insights to tailor client presentations
- Practice delivering persuasive presentations to simulated clients
- Handle objections using structured response techniques
- Apply follow-up strategies using CRM automation tools
- Evaluate presentation effectiveness using audience feedback
- Coordinate CRM updates following client presentations
- Conduct a final client presentation simulation exercise

Conclusion

By successfully completing the CRM & Presentation Skills Training Course, participants will have acquired practical techniques in CRM data management, customer segmentation, and presentation design. They will gain confidence in delivering persuasive presentations, handling objections, and using CRM insights to strengthen client relationships. Gentex Training Center remains committed to helping professionals develop combined technical and communication skills that directly improve customer engagement and business outcomes.

FAQs





Q1 What is the "CRM & Presentation Skills" course about?

This course teaches participants how to manage customer relationships using CRM systems while delivering persuasive presentations. It combines CRM data management, customer segmentation, and presentation design techniques, helping professionals engage clients effectively and convert prospects into loyal customers.

Q2 What are the key benefits of the "CRM & Presentation Skills" course?

Participants improve customer data organization, strengthen presentation delivery, and increase client engagement. The course enhances sales effectiveness, supports better follow-up communication, and equips professionals with skills that improve both CRM adoption and presentation outcomes.

Q3 What skills will I gain from the "CRM & Presentation Skills" course?

Participants develop CRM data management, customer segmentation, presentation design, and persuasive delivery skills. These four core competencies enable professionals to organize customer information, tailor engagement strategies, and present ideas confidently to clients and stakeholders.



Q4 What tools, methods, or standards are covered in the "CRM & Presentation Skills" course?

The course covers CRM pipeline tracking, customer segmentation techniques, the "tell, show, tell" presentation framework, and data visualization principles. Participants also apply presentation software tools and CRM automation features throughout the training.

Q5 How is the "CRM & Presentation Skills" course applied in real-world practice?

Participants apply CRM and presentation techniques when managing client accounts, preparing sales pitches, and delivering stakeholder updates. These skills support daily tasks such as tracking customer interactions, designing persuasive slides, and following up on sales opportunities.