Advanced Marketing Automation and CRM Implementation Training Course



23 - 27 Nov 2026

Cape town

4600 € (Per Person)

Ref: #MAR2178_284675

Course Introduction / Overview:

This comprehensive course is designed to bridge the critical gap between marketing efforts and sales results through the strategic implementation of Marketing Automation and Customer Relationship Management (CRM) systems. In today's data-driven landscape, a disconnected approach to customer engagement leads to lost opportunities and inefficient resource allocation. This program provides a complete roadmap for integrating these powerful technologies to create a seamless customer journey, from initial awareness to long-term loyalty. As noted by Paul Greenberg in his seminal work, "CRM at the Speed of Light," the focus must be on creating engaged customer relationships, a principle that underpins this entire curriculum. Participants will move beyond basic platform functionalities to master the strategic frameworks required for successful CRM implementation, lead nurturing, workflow automation, and performance analytics. BIG BEN Training Center has developed this course to empower professionals to architect and manage a sophisticated marketing and sales engine that drives measurable growth, enhances customer lifetime value, and provides a significant competitive advantage. This is not just a technical course; it is a strategic immersion into the future of customer relationship management and personalized marketing at scale.

Target Audience / This training course is suitable for:

- Marketing Managers and Directors.
- CRM Administrators and Specialists.
- Sales Managers and Team Leaders.
- Digital Marketing Professionals.
- Business Analysts.
- IT Professionals involved in marketing technology.
- Business Owners and Entrepreneurs.
- Customer Experience Managers.

Target Sectors and Industries:

- Technology and Software as a Service (SaaS).
- E-commerce and Retail.
- Financial Services and Insurance.
- Healthcare and Pharmaceuticals.
- Real Estate and Property Development.
- Professional Services and Consulting.
- Telecommunications.
- Government and Public Sector Agencies.

Target Organizations Departments:

- Marketing Department.
- Sales Department.
- Customer Service and Support Department.
- Information Technology (IT) Department.
- Business Development Department.
- Operations Department.
- Strategy and Planning Department.

Course Offerings:

By the end of this course, the participants will have able to:

- Develop a comprehensive strategy for CRM and marketing automation implementation.
- Map the end-to-end customer journey and identify key automation touchpoints.
- Design and build effective lead nurturing and drip marketing campaigns.
- Implement a robust lead scoring model to prioritize sales-ready leads.
- Master data segmentation techniques for highly personalized communication.
- Integrate CRM and marketing automation platforms for seamless data synchronization.
- Analyze key performance indicators (KPIs) to measure marketing ROI.
- Optimize automated workflows for continuous improvement and efficiency.
- Align sales and marketing teams around a unified technology stack and common goals.
- Leverage customer data to enhance customer lifetime value and retention.

Course Methodology:

The training methodology at BIG BEN Training Center is designed for maximum engagement and practical application. This course adopts a blended learning approach that combines expert-led instruction with hands-on, interactive workshops. Participants will move beyond theory to work on real-world case studies, analyzing successful and unsuccessful CRM and marketing automation implementations to draw actionable insights. A significant portion of the training is dedicated to collaborative group exercises where attendees will design lead nurturing workflows, develop lead scoring criteria, and create implementation roadmaps. These team-based activities foster peer-to-peer learning and problem-solving. The instructor will facilitate dynamic discussions, ensuring that complex concepts are understood and can be applied to each participant's unique organizational context. Practical labs and simulations will provide a safe environment to practice configuring automation rules and analyzing performance dashboards. Continuous feedback and Q&A sessions are integrated throughout the five days to ensure a deep and lasting understanding of the principles and practices taught.

Course Agenda (Course Units):

Unit One: Foundations of Integrated Marketing and Sales Technology

- The Strategic Imperative of Marketing Automation and CRM.
- Understanding the Modern Customer Journey.
- Aligning Sales and Marketing Departments for Success (Smarketing).
- Core Concepts of Customer Relationship Management (CRM).
- Core Concepts of Marketing Automation (MA).
- Key Differences and Synergies Between CRM and MA Platforms.
- Building the Business Case for an Integrated Tech Stack.

Unit Two: Strategic CRM Implementation and Data Management

- Planning Your CRM Implementation Project from A to Z.
- Defining Business Requirements and Selecting the Right Platform.
- Data Migration Strategies and Best Practices for Clean Data.
- Customizing CRM Fields, Objects, and Layouts.
- User Adoption Strategies and Internal Training Plans.
- Fundamentals of Customer Data Platforms (CDP).
- Ensuring Data Privacy and Compliance in CRM.

Unit Three: Designing and Executing Marketing Automation Campaigns

- Building Your First Automated Email Drip Campaign.
- Lead Capture Strategy using Forms and Landing Pages.
- Developing a Dynamic Lead Scoring and Grading Model.
- Advanced Segmentation for Hyper-Personalization.
- Designing Complex Nurturing Workflows with Branching Logic.
- A/B Testing for Campaign Optimization.
- Automating Internal Notifications for Sales Team Follow-up.

Unit Four: Advanced Integration and Omnichannel Automation

- The Technical and Strategic Aspects of CRM-MA Integration.
- Achieving a 360-Degree Customer View with Synchronized Data.
- Closed-Loop Reporting for True Marketing ROI Measurement.
- Automating the Sales Funnel and Hand-off Process.
- Expanding Automation to SMS, Social Media, and Web Channels.
- Using Dynamic Content to Personalize the User Experience.
- Workflow Automation for Customer Service and Onboarding.

Unit Five: Analytics, Optimization, and the Future of Automation

- Defining Key Performance Indicators (KPIs) for MA and CRM.
- Building Dashboards to Monitor Campaign Performance and Sales Velocity.
- Attribution Modeling to Understand Channel Effectiveness.
- Optimizing the Entire Funnel from Lead to Revenue.
- Introduction to AI and Predictive Analytics in Marketing Automation.
- The Future of Customer Engagement and Proactive Communication.
- Developing a Roadmap for Continuous Improvement and Innovation.

FAQ:

Qualifications required for registering to this course?

There are no requirements.

How long is each daily session, and what is the total number of training hours for the course?

This training course spans five days, with daily sessions ranging between 4 to 5 hours, including breaks and interactive activities, bringing the total duration to 20 - 25 training hours.

Something to think about:

How might predictive analytics and AI transform traditional lead scoring models within an integrated CRM and marketing automation ecosystem?

What unique qualities does this course offer compared to other courses?

This course distinguishes itself by focusing on the strategic integration of marketing automation and CRM, rather than providing siloed, tool-specific training. While many programs teach the "how-to" of a single platform, our curriculum emphasizes the "why" and "when," empowering participants to architect a cohesive technology stack that aligns directly with business objectives. We delve deep into the critical process of sales and marketing alignment, a common failure point in technology adoption, providing frameworks to foster collaboration and create a unified revenue team. The curriculum is built on a foundation of practical application, using real-world case studies and hands-on workshops that challenge participants to solve complex integration and automation problems. Furthermore, the course is forward-looking, dedicating significant time to advanced analytics, optimization, and the emerging role of AI and predictive modeling in customer engagement. This strategic, holistic, and future-focused approach ensures that graduates are not just proficient users but are true architects of a modern, data-driven customer experience engine, capable of driving sustainable growth and demonstrating clear marketing ROI.