

CRM Certification Seminar Series



Fall 2007

U.S. Professional CRM Certification Seminar Series

Essential Customer Strategies for the 21st Century

Boston Regional Seminar
(Oct 2-3)



Endorsed by:



Professional Certification

The Fall 2007 CRM Certification Seminar Series

The **2007 U.S. Professional CRM Certification Seminar Series** provides you with tangible benefits and an immediate return on your investment. Customer Relationship Management is now a mainstream part of business strategy. The customer has moved to the center of the business ecosystem. This seminar is designed to teach you CRM strategy as it is meant to be in the 21st century. You will be awarded a Certification in Applied CRM Strategy endorsed by Rutgers University Center for CRM Research, CRMGuru.com, the National CRM Association, CRMA Japan and Greater China CRM upon successful completion of the seminar.

Globally Recognized CRM Certification

- Sales executives, managers and professionals
- Marketing executives, managers and professionals
- Customer support executives, managers and professionals
- Corporate customer strategy executives, managers and professionals
- CRM industry, technology and services executives, managers and professionals
- CRM consulting and professional services organizations



Globally Recognized CRM Certification

Attendees of this seminar receive Certification in Social Media and CRM 2.0 endorsed by Rutgers University Center for CRM Research, the National CRM Association, CRMGuru.com, Greater China CRM and the CRMA in Japan.

Our Seminar Sponsors

Our seminars are sponsored by the nations most distinguished companies including: Accenture, Aplicor, BearingPoint, BlackBerry, Cognizant, Neighborhood America, iSymmetry, RightNow, SalesNet, KnowledgeStorm, Eloqua, Unica, the Technical Evaluation Center, RWD Technologies and many other premier companies.



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Certification Seminar Schedule

Philadelphia (Sept 4-5)

Boston (Oct 2-3)

The Fall **2007 U.S. Professional CRM Certification Seminar Series** will be held in Philadelphia on Sept 4-5 and Boston on Oct 2-3. Participants attending these seminars are from the global 1000. To see a full list of those who attended our 2006 seminars visit www.crmassociation.org. Companies and U.S. government organizations attending our seminars include: IBM Corporation, Accenture, BearingPoint, Siebel, Halliburton, SAP, Giorgio Armani, United States House of Representatives, U.S. Defense Logistics Agency, US General Administration, Chevron, Booz, Allen, Hamilton, Sandia National Laboratories, John Hopkins Medical Group, Aplicor, Pepco Holdings, Kohler, American Century Investment and many more.

Each attendee receives Certification in Applied CRM Strategy endorsed by Rutgers University CRM Research Center, the National CRM Association-US, and CRMGuru. In Asia, the Certificate is endorsed by the CRMA-Japan and Greater China CRM (GCCRM).

Boston Seminar

Boston Regional Seminar

October 2-3

Waltham Bay Colony Center

1050 Winter Street, Suite 1000

Waltham, Mass 02451

Registration Information

You can register for the 2007 U.S. Professional CRM Certification Seminar Series online at www.bptpartners.com. The regular price seminar is \$1450. Current early bird registration is \$1150.



Call 770-856-2418 for more information or visit our website at www.bptpartners.com

Seminar Presenters

Taught By Internationally Recognized Authorities

Bruce Culbert

Mr. Bruce Culbert is described as an e-Commerce visionary by Forrester Research and a "charismatic leader" by Information Week. CRM Magazine recognized him as "One of the 20 Most Influential People in CRM" when featuring the "best and the brightest the CRM Market has to offer". Mr. Culbert's career represents more than 20 years of experience leading ground breaking information technology solutions and launching new business initiatives for companies including IBM, BearingPoint, KPMG and salesforce.com.

Paul Greenberg

Mr. Paul Greenberg is an internationally renowned expert on CRM and one of CRM's most influential authors. His best-selling book, CRM at the Speed of Light: Essential Customer Strategies for the 21st Century, is now in eight languages and is used as a textbook in over 60 countries and universities across multiple continents. It is called "the number 1 CRM book" by SearchCRM.com. The Asian edition of CIO Magazine named it one of the 12 most important books an Asian CEO will ever read. Mr. Greenberg is the co-chairman of Rutgers University's CRM Research Center and Executive Vice President of the CRM Association.

Dr. Jeff Tanner

Dr. Jeff Tanner is an internationally known expert in sales and sales management. He is author or co-author of eleven books, including the best selling textbook, Selling: Building Partnerships and the leading relationship marketing text Business Marketing: Connecting Strategy, Relationships, and Learning. His books have been translated into several languages, and distributed in over 30 countries. His eleventh book, The Hard Truth About Soft Selling, is co-authored with noted sales psychologist George Dudley.

Michael Chuchmich

Mike Chuchmich has 20 years experience in managing and directing transformational change and people development organizations and projects globally. His experience includes developing strategic and tactical change solutions for corporations employing from 2000 to 100,000+ people. Specifically, his experience includes leading teams in strategic planning, organizational restructuring, business system and process re-engineering, business transformation, integrated workforce training and development, leadership development, and global learning and performance systems design and deployment.

Dick Lee

Dick Lee founded High-Yield Methods (originally High-Yield Marketing) to promote customer-centricity in ways not possible in an advertising agency environment. While continuing to work in this vein, starting in the mid-90s the firm became deeply involved in the CRM movement. In response to the need to redesign business process in order to successfully implement CRM, HYM also developed and introduced a new process design approach specific to non-manufacturing environments called Visual Workflow. Today, HYM is known nationally both for its expertise in helping clients develop customer-centric strategies and for helping clients implement these strategies through changes in people, process and technology. In addition, clients often retain HYM to apply Visual workflow and implement automation technologies in human resources, order-to-cash and other variable work environments.

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Certification Course Agenda

Day 1

Morning Session

8:00-8:30 Registration and Networking

8:30-9:00 Introduction & Overview

9:00-11:00 CRM Strategy

Customer demands are constantly changing, and with the newly empowered customer, the demands are more strident than ever. A CRM strategy is no longer a core strategy for a business, it **IS** business strategy. A company that executes successfully can be profitable and have scores of customer advocates but if you don't.... Find out what the core elements of CRM strategy are and how to go about planning and executing one – even in a Web 2.0-driven customer ecosystem.

11:00-11:15 Break

11:15-12:15 Customer-Aligned Business Process

Even the best designed customer strategies generate little value for customer or company unless supported by business process - process specifically designed to increase value delivered to customers. Unfortunately most traditional process design approaches don't produce customer-centric outcomes, but focus on internal goals instead. This session will introduce you to a new way to view process design, along with a new process-design methodology proven successful in supporting customer strategies.

12:15-1:00 Lunch

Afternoon Session

1:00-2:00 Customer-Aligned Business Process

2:00-2:15 Break

2:15-4:15 Technology Selection & Implementation

Technology should be selected and implemented to support the customer strategy, the business process and the people involved. Make the most of your technology investment by choosing the right solution to deliver superior ROI. This session will provide a useful framework and outline the critical success factors for evaluating technology options the right way, determining total cost of ownership and return-on-investment, and an understanding of the important implementation and roll-out consideration including a system for measuring results. If you follow these best practices when selecting and implementing technology for your customer initiatives you will improve your probability for success.

4:15-5:00 Summary

Day 2

Morning Session

7:30-8:00 Networking & Continental Breakfast

8:00–9:30 Customer Managed Experience:
Plan, Map, Execute

The voice of the customer is not the voice that roams around your head – it's the actual voice of your real customers. How they interact with your company is the actual make or break reason that they remain with – or leave – you. Learn what it takes to map a customer's experience, and what tools you need to listen to the real voice of the real customer. Learn how to understand what the customer is REALLY saying, not what you think they are. That will be the difference between an advocate or an enemy – and the difference between you and your competition – which is both companies like you and the expectations of your customers. Mission-critical actions for the 21st century.

9:30-10:15 CEM Exercise

10:15-10:30 Break

10:30-12:30 Identifying & Creating Customer Value:
Customer Loyalty & Customer Profitability

The loyalty effect is not all it is cracked up to be. Multiple types of loyalty exist, and to emphasize one over another may yield tragic results. For effective CRM, the right measurement system coupled with intelligent customer value design results in loyalty that drives long-term customer profitability.

12:30-1:30 Lunch

Afternoon Session

1:30-3:30 Change Management

Linking business strategy to behaviors and human interaction is essential to maximize the CRM program. Learn the importance of change management and how to apply new techniques effectively.

3:30-4:00 Wrap-Up. Evaluations

Professional CRM Certification

Certification in Applied CRM Strategy

The Certification in Applied CRM Strategy is comprised of five courses each designed to advance your knowledge and understanding of how to leverage established and proven customer focused strategies and techniques to attract, satisfy and grow your customer base.



Attendees will learn to:

- Create customer driven strategies that improve long-term customer equity and shareholder value.
- Devise a strategy that takes the Voice of the Customer and the creation of customer value into account in every facet of your planning including processes, technologies and cultures.
- Collaborate with your customers to design and optimize the appropriate customer experience that allows him/her optimal control over how they interact with you — without diminishing your business requirements.
- Derive customer value and reveal present and future value of each of your customers — helping you decide how to allocate your scarce resources among each of those customers.
- Create organizational strategies and action plans that enable CRM success for customers, partners and initial stakeholders.
- Deploy a set of 'best practices' for evaluation CRM software solutions.



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- TEC's 21 evaluation centers ranging from business intelligence, ERP, SCM, HR, CRM Outsourcing, Open Source and Enterprise Content Management.
- Each evaluation center contains thousands of detailed criteria on more than 800 technology solutions.
- On-line tools lets you compare solutions by prioritizing thousands of criteria and analyzing their strengths and weaknesses through graphs, reports and scenario analysis.



The Technology Evaluation Center (TEC) is a leading on-line source for impartial technology and consulting evaluations. Its mission is to reduce the cost, risk and time associated with software selection.

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Early Bird Discount

Register Online & Save \$300



Register Online for the Fall 2007 CRM Certification in Applied Strategy Seminar Series

Early Bird Discount Price is \$1150

You can save \$300 off the regular price of \$1450.

National CRM Association

“This advanced training delivers immediate ROI for your company and your career.”

Michael Thomas
President
National CRM Association

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Learn how to:

- Create customer driven strategies that improve long-term customer equity and shareholder value.
- Devise a strategy that takes the Voice of the Customer and the creation of customer value into account in every facet of your planning including processes, technologies and cultures.
- Collaborate with your customers to design and optimize the appropriate customer experience that allows him/her optimal control over how they interact with you — without diminishing your business requirements.
- Derive customer value and reveal present and future value of each of your customers — helping you decide how to allocate your scarce resources among each of those customers.
- Create organizational strategies and action plans that enable CRM success for customers, partners and initial stakeholders.

Registration Policy:

Seminar seating is limited and all registrations will be honored on a first come first serve basis. All sales will be final. If for any reason you are unable to attend the seminar you have registered for, you may designate another person to attend in your place or participate in a session at another location on the tour, if seating is available.

Please contact Bill Howell at (770) 856-2418 or by email bhowell@bptpartners.com, if you have any additional questions.

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TEC has a library of knowledge bases, ranging in content from enterprise resource planning (ERP), supply chain management (SCM), customer relationship management (CRM), business intelligence (BI), and outsourcing, to financial, health services, radio frequency identification (RFID), and open source, all with data vetted by analysts.

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This year, FrontRange introduced GoldMine Enterprise and Premium Editions, the latest additions to its award-winning GoldMine product line. To speak with a GoldMine CRM Specialist call 1.800.443.5457 or visit www.goldmine.com.

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Since 1999, Aplicor has pioneered easy-to-use and feature rich CRM and accounting software-as-service (SaaS) solutions for midmarket and enterprise organizations. When Aplicor first released its online CRM application, the concept of providing enterprise-level CRM applications online, on-demand and at a fraction of the cost of client/server systems was yet unproven. Since that time, SaaS hosted delivery has become a platform of choice, the subscription pricing model has become a preferred acquisition method and the Internet has dominated as a delivery mechanism that removes the IT administration and headaches for organizations of all sizes.

Analysts, media and users have spoken in concert to recognize Aplicor as the most independently awarded CRM application from 2004 through 2006. Aplicor has been twice named the **Best Product Development Company** in North America by the ABA and three times named the **Product of the Year** by Technology Marketing Corporation (TMCT) and Customer Inter@action Solutions® magazine.

Aplicor has been recognized with nineteen (19) industry awards including four Users Choice Awards, two CRM Excellence Awards, two Technology Business of the Year awards, Hosted CRM Winner, CRM WizKids Winner, Internet Technology Showcase Winner and the Best of the Best Award. The Aplicor product evolution will continue to fulfill the original vision of complete front-to-back-office hosted business systems based on a subscription pricing model and implemented in a fraction of the time and cost of comparable applications. www.aplicor.com



Founded in 1999, Neighborhood America is built on the premise that meaningful interaction drives value for your organization – whether that 'value' is defined as better decisions or bottom-line financial results. Our Software as a Service solutions help you to realize that value by enabling you to easily 1) engage your audience – wherever they are; 2) listen to what they are saying – through meaningful, organized feedback; and 3) act on the information – with structured results that can be immediately integrated into your workflow processes. Neighborhood America is the only company that provides a comprehensive and complete infrastructure solution to collect, manage and report multiple forms of media across multiple devices – including cell phones – all from one secure, highly engineered, and tested platform.

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We earn recognition for our client service from leading analysts and trade publications but are proudest of our high customer satisfaction scores. www.bearingpoint.com



Cognizant is a leading provider of IT and business process outsourcing services. Focused on delivering strategic information technology solutions that address the complex business needs of its clients, Cognizant uses its own global delivery outsourcing model to provide applications management, development, integration, and reengineering; infrastructure management; business process outsourcing; and numerous related services, such as enterprise consulting, technology architecture, program management, and change management.

Cognizant has over 40,000 employees and maintains P-CMM, SW-CMM and CMMI Maturity Level 5 assessments. Ranked among the top information technology companies in Business Week's Hot Growth Companies, Cognizant is a member of the NASDAQ-100 Index and the S&P 500 Index. www.cognizant.com

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RWD has built a strong reputation by delivering technology and training solutions that help operational efficiency and reduce costs by streamlining processes and procedures. Based in Baltimore, Maryland, RWD serves Fortune 500 and major multinational corporations around the world. RWD's solutions are used in more than 20 industries, including finance, pharmaceuticals, petrochemicals, manufacturing, automotive, rail, telecommunications, healthcare, and consumer products. RWD has annual revenues of over \$100 million, and more than 850 employees working out of offices in the United States, United Kingdom, France, Germany, Australia, and Canada. In addition, RWD's international consultants and partners serve clients in every corner of North America, Europe, and Asia.
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Founded in 1998, KnowledgeStorm is the Internet's top-ranked search resource for technology solutions and information. Leveraging the KnowledgeStorm Network of premier partners and its extensive search expertise, KnowledgeStorm is able to reach technology buyers and deliver the information they need no matter where their search begins. KnowledgeStorm, with its network, search expertise and performance tools and services, is a powerful resource for technology vendors, providing them the most opportunities to reach buyers on the Internet and convert them into Web leads.

Research shows that 93% of all technology purchases begin with an Internet search. So, technology vendors know that online marketing has to be a large part of their overall marketing mix. But, they are challenged with how to get the biggest return for the online marketing dollars. That's what KnowledgeStorm is all about. KnowledgeStorm gets strong results because of the reach of the KnowledgeStorm Network, extensive search expertise and Results360™ performance tools and services. With KnowledgeStorm, buyers can find technology vendors no matter where their search begins. www.knowledgestorm.com



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