Training course on Prospecting and Client Relationship Management (CRM)

Professional Development Training Course Outline

Category	Real Estate Institute	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

In today's dynamic and client-centric real estate market in Nairobi and beyond, mastering Prospecting and Client Relationship Management (CRM) is the dual pillar for sustainable business growth and long-term success. Training Course on Prospecting and Client Relationship Management (CRM) is meticulously designed to equip real estate agents, brokers, sales professionals, and team leaders with the cutting-edge strategies and interpersonal skills necessary. Beyond transactional interactions, this specialized discipline demands a proactive and empathetic mindset, blending strategic outreach, personalized communication, data-driven insights, and the leveraging of CRM technology to streamline lead flow, enhance client satisfaction, and significantly boost conversion rates and referral business. This program delves into nuanced methodologies for developing robust multi-channel prospecting plans, mastering advanced lead qualification and nurturing techniques, and exploring cutting-edge approaches to client segmentation, retention strategies, and the intelligent utilization of CRM platforms. A significant focus will be placed on understanding the interplay of market intelligence, sales psychology, and technological tools across diverse real estate segments, managing complex client interactions efficiently, and optimizing the client journey through consistent engagement and value delivery. By integrating industry best practices, analyzing real-world successful prospecting campaigns and CRM implementations in real estate, and engaging in hands-on scripting, client profiling, and CRM workflow exercises, attendees will develop the strategic acumen to confidently build a thriving client base, fostering unparalleled sales productivity, client loyalty, and securing their position as indispensable leaders in modern real estate sales and relationship building.

Programme Curriculum

Training Course on Prospecting and Client Relationship Management (CRM)

Introduction:

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This program delves into **nuanced methodologies** for **developing robust multi-channel prospecting plans**, mastering **advanced lead qualification and nurturing techniques**, and exploring **cutting-edge approaches** to **client segmentation, retention strategies, and the intelligent utilization of CRM platforms**. A significant focus will be placed on understanding the interplay of **market intelligence, sales psychology, and technological tools** across diverse real estate segments, managing **complex client interactions efficiently**, and **optimizing the client journey** through **consistent engagement and value delivery**. By integrating **industry best practices**, analyzing **real-world successful prospecting campaigns and CRM implementations in real estate**, and engaging in hands-on **scripting, client profiling, and CRM workflow exercises**, attendees will develop the **strategic acumen** to confidently build a thriving client base, fostering unparalleled **sales productivity, client loyalty**, and securing their position as indispensable leaders in **modern real estate sales and relationship building**.

Course Objectives :

Upon completion of this course, participants will be able to:

1. **Analyze core principles and strategic responsibilities** of **prospecting and CRM in real estate**.
2. **Master sophisticated lead generation techniques** across **diverse online and offline channels**.
3. **Develop nuanced lead qualification and segmentation strategies** for **targeted outreach**.
4. **Implement effective client relationship management processes** using **CRM platforms**.
5. **Manage complex sales pipelines and client interactions** through **CRM automation**.
6. **Apply robust strategies** for **nurturing leads and building long-term client loyalty**.
7. **Understand the integration of prospecting activities** with **CRM data and workflows**.
8. **Leverage CRM reporting and analytics** for **data-driven insights into client behavior and sales performance**.
9. **Optimize communication strategies** for **personalized and impactful client engagement**.
10. **Formulate specialized prospecting plans** for **diverse real estate niches and client demographics**.
11. **Conduct advanced client profiling and needs analysis** for **tailored service delivery**.
12. **Navigate challenging situations** such as **cold outreach resistance and client churn prevention**.
13. **Develop a holistic strategic plan** for **continuous prospecting and exceptional client relationship management**.

Target Audience:

This course is designed for real estate professionals seeking advanced skills in Prospecting and Client Relationship Management:

1. **Real Estate Agents (New & Experienced):** Seeking to enhance lead generation and client retention.
2. **Real Estate Brokers:** Aiming to optimize their lead acquisition and client nurturing processes.
3. **Real Estate Sales Managers/Team Leaders:** Focused on building high-performing prospecting and CRM-driven teams.

4. **Real Estate Developers:** Utilizing prospecting for project sales and managing buyer relationships.
5. **Real Estate Marketing Specialists:** Wishing to align marketing efforts with sales prospecting and CRM.
6. **Real Estate Investors:** Seeking advanced methods for sourcing deals and managing investor relations.
7. **CRM Administrators/Support Staff:** Looking to deepen their understanding of CRM strategic application.
8. **Any Real Estate Professional:** Who is responsible for generating new business and managing client interactions.

Course Duration: 5 Days

Course Modules :

- **Module 1: Strategic Foundations of Prospecting in Real Estate**
    - Defining **prospecting** and its critical role in the real estate sales cycle.
    - Understanding the **buyer/seller journey** from initial contact to conversion.
    - Developing a **proactive prospecting mindset** and overcoming common fears.
    - Establishing **clear prospecting goals and metrics** for success.
    - Ethical considerations and best practices in initial client outreach.
- **Module 2: Multi-Channel Prospecting Techniques**
    - Mastering **digital prospecting**: social media, online ads, content marketing leads.
    - Implementing **traditional prospecting**: cold calling, door knocking, direct mail (where applicable).
    - Strategies for building a **robust referral network** and leveraging past clients.
    - Utilizing **community engagement and local networking** for organic leads.
    - **Case Study:** Developing a diversified prospecting plan combining digital and traditional methods for a local market.
- **Module 3: Lead Qualification, Segmentation & Nurturing**
    - Developing **effective lead qualification frameworks** (e.g., BANT, Budget, Authority, Need, Timeline).
    - Techniques for **segmenting leads** based on motivation, timeline, property type, and behavior.
    - Crafting **compelling value propositions** for different lead segments.
    - Designing **multi-touch lead nurturing sequences** for long-term engagement.
    - **Case Study:** Creating a lead scoring system to prioritize hot leads for immediate follow-up.
- **Module 4: Introduction to CRM for Real Estate Prospecting**
    - Understanding the **fundamental role of CRM** in managing prospects and clients.
    - Overview of **leading real estate CRM platforms** (e.g., HubSpot, Follow Up Boss, Propertybase).
    - Best practices for **initial lead entry and data integrity** in CRM.
    - Setting up **automated lead capture and assignment** workflows.
    - **Case Study:** Configuring a CRM dashboard to track new lead sources and initial engagement metrics.
- **Module 5: CRM for Sales Pipeline Management & Automation**
    - Designing and customizing **sales pipeline stages** within CRM for clear progression.
    - Tracking **prospect interactions, activities, and communication history** seamlessly.
    - Implementing **automated tasks, reminders, and follow-up sequences** within CRM.
    - Utilizing **CRM for drip campaigns, email marketing, and personalized outreach**.
    - **Case Study:** Automating a 7-day follow-up sequence for newly qualified buyer leads in a CRM.
- **Module 6: Advanced Client Relationship Management Strategies**
    - Moving beyond lead nurturing to **long-term client retention strategies**.
    - Techniques for **proactive client communication** and value delivery.
    - Leveraging **CRM for client segmentation and personalized service delivery**.

    - Building a **strong referral program** driven by exceptional client experiences.
    - **Case Study:** Developing a post-transaction client appreciation and referral-request campaign within CRM.
- **Module 7: Data-Driven Prospecting & CRM Analytics**
    - Utilizing **CRM reporting and analytics** to measure prospecting effectiveness.
    - Analyzing **lead source ROI, conversion rates, and sales cycle duration**.
    - Identifying **bottlenecks and areas for improvement** in your prospecting and CRM process.
    - Forecasting **future sales pipeline health** based on CRM data.
    - **Case Study:** Analyzing CRM data to identify the most profitable lead sources over the past quarter.
- **Module 8: Ethical Practice, Future Trends & Continuous Growth**
    - Maintaining **ethical standards and data privacy** in all prospecting and CRM activities.
    - Exploring **emerging technologies**: AI in lead scoring, chatbots, virtual assistants for prospecting.
    - The role of **personal branding** in attracting and retaining clients.
    - Strategies for **continuous learning and adapting** to market changes.
    - **Case Study:** Discussing the ethical implications of using advanced data for prospecting and ensuring compliance.

Training Methodology

- **Interactive Workshops:** Facilitated discussions, group exercises, and problem-solving activities.
- **Case Studies:** Real-world examples to illustrate successful community-based surveillance practices.
- **Role-Playing and Simulations:** Practice engaging communities in surveillance activities.
- **Expert Presentations:** Insights from experienced public health professionals and community leaders.
- **Group Projects:** Collaborative development of community surveillance plans.
- **Action Planning:** Development of personalized action plans for implementing community-based surveillance.
- **Digital Tools and Resources:** Utilization of online platforms for collaboration and learning.
- **Peer-to-Peer Learning:** Sharing experiences and insights on community engagement.
- **Post-Training Support:** Access to online forums, mentorship, and continued learning resources.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

- Participants must be conversant in English.
- Upon completion of training, participants will receive an Authorized Training Certificate.
- The course duration is flexible and can be modified to fit any number of days.
- Course fee includes facilitation, training materials, 2 coffee breaks, buffet lunch, and a Certificate upon successful completion.

- One-year post-training support, consultation, and coaching provided after the course.
- Payment should be made at least a week before the training commencement to Fineskill Training Center account, as indicated in the invoice, to enable better preparation.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

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