

# How to do customer relationship management? : The vTiger CRM

If you're in sales or marketing, chances are you've used a CRM. For those who do not know, CRM (customer relationship management) or GRC in French are used to keep a lot of information and statistics in relation to customers in order to have a personalized approach.

By working with a CRM, all your colleagues can update the data and see what the customer's last orders were. This allows you to know what he needs, but also to interact with him in unique ways. If you have customers, having a CRM is an essential tool to have a competitive advantage.

## **vTiger: What is it?**

One of the best CRM software available on the market is without a doubt vTiger. Thanks to vTiger, you will be able to manage the relationship with your customers in a few clicks. Everything is located in one place and the software allows it to be linked to other communication, sales, accounting and marketing tools.

Your products and inventory as well as what you sell for each customer are held in vTiger's database. Also, you will have access to your customers' accounts, your quotes, invoices or supplier orders. A CRM such as vTiger allows you to always be one step ahead. At the speed at which things are moving today, it is a luxury that we do not want to deprive ourselves of.

Of course, vTiger is made up of a multitude of advanced tools to put you in control when it comes to customer relationship management. In this regard, Doussou Formation can certainly help you get started with this software.

## **How can Doussou Formation help you?**

The first step in adapting our marketing or sales approach is the consumer journey. Our course is no different. Thus, you will see the user journey and what it entails in a CRM like vTiger. Then we will learn together how to build multi-channel relationship marketing. You will learn to manage the combination with the different tools, but also to segment your customers. Once that's done, we'll explore the plethora of data management possibilities.

At the end of this training, you will be able to use vTiger to its full

potential. All this, thanks to the expertise of our trainers who have more than 20 years of experience in web marketing and teaching.

If you are in sales and unfamiliar with vTiger or want to improve your results through customer relations, enroll in our vTiger course without hesitation.

Vtiger CRM Training:

<https://www.doussou-formation.com/formation/formation-crm-vtiger-relation-client/>

---

# HubSpot Training: Mastering Customer Relationship Management (Beginner)

## Module 1 – Understanding the Logic of a Modern CRM

- The role of a CRM in an organization: objectives, benefits, and limitations
- Differences between CRM, marketing automation, and sales tools
- Overview of HubSpot (CRM, Marketing, Sales, Service) and common use cases
- Best practices: adoption, data quality, and follow-up discipline

## Module 2 – Getting Started with the HubSpot Environment

- Interface discovery: navigation, menus, views, and search
- Essential settings: profile, company details, preferences, units
- User management: roles, access rights, and security principles
- Work organization: dashboards, shortcuts, and startup methodology

## Module 3 – Structuring Your Customer Database

- Creating and managing contacts, companies, and associations
- Understanding properties: standard fields, custom fields, field types
- Data import and cleanup: formats, duplicates, and consistency rules
- Effective segmentation: filters, views, and lists for targeting

## Module 4 – Centralizing Interactions and Customer Follow-Up

- Activity timeline: notes, emails, calls, meetings, and traceability
- Task creation and management: priorities, reminders, organization
- Managing interaction history: search, sorting, and key information
- Daily routine: a simple method to ensure nothing is missed

## Module 5 – Capturing Leads Effectively

- Conversion principles: visitor → lead → contact journey
- Form creation: fields, validation, messages, and best practices
- Website integration: tracking, embedding, and data consistency
- Conversion pages: structure, calls to action, and compliance principles

## Module 6 – Communicating with Your Contact Database

- Campaign preparation: objectives, audience, messaging, and scheduling
- Email creation: content, subject lines, personalization, segmentation
- Best practices: deliverability, consent, frequency, and quality
- Performance analysis: open rates, clicks, and optimization opportunities

## Module 7 – Automating Simple Actions

- Understanding automation: triggers, conditions, and actions
- Basic automations: notifications, assignment, follow-up, reminders
- Structuring a simple journey: post-form or post-interaction automation
- Best practices: avoiding over-automation, testing, and monitoring

## Module 8 – Organizing Support and Request Follow-Up

- Structuring customer request handling: tracking logic and priorities
- Centralizing exchanges: traceability and internal collaboration principles
- Organization methods: categories, statuses, and urgency levels
- Continuous improvement: standardizing responses and reducing delays

## Module 9 – Measuring and Managing Performance

- Defining relevant KPIs: acquisition, conversion, follow-up, engagement
- Dashboards: reading, widgets, and essential indicators
- Interpreting results: trends, anomalies, and corrective actions
- Improvement planning: adjusting messages, segments, and processes

# Training for Non-Profit Organization

---

Nonprofit organizations work tirelessly for causes that support our communities. At Doussou Formation, we operate with the same mindset. We believe in our teams, strive to make a difference for our learners, and constantly seek greater efficiency.

Understanding the mission of nonprofits, and having worked with many of them in the past, we are proud to offer our support.

To help you better serve your communities, we provide an exclusive 15% discount on all our training courses for nonprofit organizations.

Doussou Formation is your first step toward training your staff and making your organization more efficient. Help more, help better—by enrolling in one of our many engaging training programs.

---

## **NPO training**

### **Human capital and customer service**

Human resources management in times of crisis

Managing a difficult employee / Recognized by Emploi-Québec

Managing conflicts in the workplace / Recognized by Emploi-Québec

How to respond effectively in a post-COVID world

Acting appropriately in situations where there is a risk of aggressiveness or assault

Attracting and retaining the best employees

Managing your time and priorities

Managing a difficult customer

### **French courses**

Popularization and adaptation of specialized text

Linguistic revision

The art of writing

Correct and enrich your texts with Antidote

Improve your written French

## **Project management and efficiency**

GIT: Write technical documentation

Confluence: Optimize collaboration in your company

Trello: Project management tool

The precepts of project management

## **Social media and web marketing**

Google Ads in 7 hours

SEO and website optimization

Initiation training: Managing LinkedIn for professionals

Managing Facebook for business

Facebook Manager and statistical tool

E-Marketing and E-Mailing (Newsletter)

CRM vTiger: Customer relationship management

Advanced training: Managing LinkedIn for professionals

Getting started with MailChimp

Getting started with Instagram

## **WordPress and website creation**

Creating a WordPress theme and SEO

WordPress: Optimize your SEO

Customized WordPress training

WordPress: Create your website with the DIVI theme

WordPress: Create a website or a blog

## Acrobat Pro

PDF Expert: Document creation and digital signature

Form and digital signature

Creation of PDS documents

Accessibility

### **Office suite**

Mastering macros and initiation to programming

Excel: Advanced

Excel: The fundamentals

[Excel: The most complete](#)

Microsoft Powerpoint

Microsoft Publisher

By email: [info@doussou-formation.com](mailto:info@doussou-formation.com)