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: Customer Relationship Management and Service Quality

Introduction to Customer Relationship Management Training

Managing Customer Needs

- Identifying customer needs
- Addressing and managing customer needs

Customer Reception Techniques (Telephone and In-Person)

Quality of Interactions Among Colleagues

- Behavioral skills in the workplace
  - Communication
  - Empathy
  - Kindness
  - Autonomy

The Concept of Service Quality

- The different levels of quality
- The dimensions of quality

Service Quality and Customer Satisfaction (the Concept of Satisfaction)

Managing Service Quality (Service Quality Standards, etc.)

Measuring and Evaluating Service Quality

- Customer satisfaction surveys
- Employee surveys and studies

Practical Workshop on Customer Relationship Management and Service Quality

Preventing Aggressive Situations in Customer Service

- Recognizing signs of aggression or threats
- Understanding causes related to customer stress
- Using calm and professional language
- Managing physical distance and posture
- Applying internal safety guidelines
- Practicing through case studies and role-playing

Conclusion of the Training: Customer Relationship Management and Service Quality

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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/

C# Training | C Sharp Course

Introduction to the C# Training

Understanding the .NET Environment
Installing Visual Studio

Hands-on Workshop: *Creating your first application*

Learning the Fundamentals of C# Syntax

Namespaces
Using Variables, Structures, and Classes
Introduction to Classes
Working with Variables in Memory
Using Strings and the using Alias Directive

Hands-on Workshop: *Writing your first program*

Mastering Object-Oriented Programming in C#

Defining Methods and Properties
Using Object Constructors
Static Class Members
Inheritance
Polymorphism
Working with Interfaces
Abstract Classes

Advanced C# Language Concepts

String Processing with StringBuilder and Regular Expressions
Collections, Dictionaries, and Hash Tables
Using the if Statement
Applying switch for Multiple Conditions
Working with Arrays
Loops (while, for, foreach)
Operators in C#
Exception Handling
Types of Exceptions

Relationships Between Classes

Inheritance
Interfaces
Aggregation
Composition

Training: Customer Portfolio Management

Why Build and Manage Customer Portfolios?

- Why create structured customer portfolios?
- The key benefits of managing customer portfolios

Defining Customer Classification Criteria

- Understanding your customers
  - Classification based on revenue, turnover, industry sector, and other relevant criteria

Developing Tailored Strategies for Different Customer Segments

- Customer relationship management strategies
- Delivering consistent service quality
- Practical role-playing workshop

Growing and Retaining a Customer Portfolio

- How to develop and expand a customer portfolio
- Best practices for maintaining long-term customer relationships

Evaluating Customer Portfolios

- Why evaluate a customer portfolio and the benefits of doing so

Customer Portfolio Evaluation Methods

- Current value of the customer portfolio
- Potential value of the customer portfolio

Statistics and Data Analysis Training with SPSS

MODULE 1: Creating and Organizing Data with SPSS

- Coding and entering data from a questionnaire into SPSS
- Adjusting variable properties in SPSS
- Handling missing values using SPSS
- Computing new variables in SPSS

MODULE 2: Descriptive Analyses with SPSS

- Frequency tables and descriptive statistics in SPSS
- Cross-tabulation tables in SPSS
- Creating charts and graphs with SPSS

MODULE 3: Bivariate Tests with SPSS

- Correlation tests: Pearson, Spearman, partial, and canonical correlations in SPSS
- Chi-square (χ^2) test with SPSS

MODULE 4: Parametric and Non-Parametric Tests with SPSS

- T-test with SPSS
- Analysis of Variance (One-way ANOVA) with SPSS
- Z-test with SPSS
- Kolmogorov-Smirnov (K-S) test with SPSS
- Wilcoxon test with SPSS
- McNemar test with SPSS
- Mann-Whitney U test with SPSS

The Most Comprehensive Power BI Training

Introduction to the Power BI Training

Review of Power BI Fundamentals

- Power BI Desktop principles and workflow

- Connecting to data with Power BI
- Preparing data in the Power Query editor
- Transformations in the Power Query editor
- Creating folders / organizing in Power BI
- Merging / combining queries in Power BI
- Hands-on workshop: transforming imported data

Importing a Pivot Table (Excel)

- Removing totals
- Merging cells
- Unpivoting columns

Modeling in Power BI

- Relationships
- Option configurations
- Understanding cardinality

Data Model in Power BI

- Flat table
- Star schema
- Relational model
- Table layout
- Workshop: create a star schema from an Excel file
- Workshop: manage a relational model in Power BI

Date Table (Calendar) in Power BI

- Why add a date table
- Create a date table in DAX
- Configure the date table in DAX
- Sort columns
- Mark as date table
- Manage multiple date columns

DAX Data

- Introduction to DAX
- Measures and columns
- DAX formulas

Visualization in Power BI

- Principles of Power BI visualization
- Creating visuals
- Creating a report — ergonomics
- Creating a report — setup
- Histograms

- Line charts
- Pie charts
- Simple table
- Conditional formatting
- Creating a matrix (pivot table)
- Interaction between visuals / customization

Advanced Excel: Data Analysis with Power Query, PivotTables & Inquire

Module 1: Power Query — Importing and Cleaning Data

Introduction to Power Query

- Understanding the interface and main features of Power Query

- Exploring compatible data sources (CSV, Excel, Web, etc.)

- Importing data into Power Query

Importing Data

- Importing CSV files, Excel workbooks, and data from websites

- Importing an entire folder to consolidate multiple similar files into a single source

Cleaning and Transforming Data

- Removing null values, duplicates, and filtering rows

- Splitting columns, changing data types, replacing values

- Detecting and correcting errors to ensure data quality

Saving and Loading Cleaned Data

- Saving transformations and loading the cleaned data into Excel for analysis

Module 2: Inquire – Analyzing and Comparing Excel Files

Introduction to Inquire

- Overview of the tool and its main functionalities

- Accessing Inquire in the Excel ribbon and configuring comparison options

Comparing Two Workbooks

- Performing a detailed comparison of two workbooks to identify differences

- Generating comparison reports to document changes and differing values

Optimizing Excel Files

- Cleaning excessive formatting to reduce file size

- Removing unnecessary formatting to improve performance

- Managing passwords to secure files

Module 3: Power Pivot – Building Reports and Linking Data

Introduction to Power Pivot

- Understanding the interface and the benefits of Power Pivot for advanced analysis

- Enabling Power Pivot in Excel and adding data sources

Creating Data Models and Relationships

- Importing and consolidating multiple tables from different sources

- Creating and managing relationships between tables to interconnect data

Calculated Columns and Measures

- Creating calculated columns with custom formulas to enrich the dataset

- Using measures for dynamic calculations within PivotTables

Building PivotTables and PivotCharts

- Creating interactive reports with PivotTables and PivotCharts

- Using slicers for quick and targeted data analysis

Exporting and Sharing Reports

- Preparing reports for export and sharing with stakeholders

- Refreshing Power Pivot data to keep reports up to date

SQL Training: Mastering SQL Queries

Introduction to **SQL Training**

- Definition of a **database**
- Definition of a Database Management System
- Defining a relational model
- Overview of the different SQL languages: DDL, DML, DCL

Module 1: Course on DCL (Data Control Language)

- SELECT FROM query
- SELECT WHERE query
- SELECT ORDER query

- SELECT LIMIT query
- SELECT EXPR … query
- SELECT FROM JOIN query
- SELECT AGGR GROUP query
- SELECT AGGR GROUP HAVING query

Module 2: Course on Data Manipulation (DML)

- Introduction to DML
- INSERT query
- INSERT SELECT query
- INSERT MULTI TABLE query
- UPDATE query
- UPDATE MULTI TABLE query
- DELETE query
- DELETE MULTI TABLE query

Module 3: Course on Data Definition (DDL)

- CREATE TABLE query
- DROP TABLE query
- ALTER TABLE query

Module 4: Theory on Advanced SQL Concepts

- Indexes and index types
- Foreign key constraints
- Basic modeling, explanation of 1st, 2nd, and 3rd normal forms
- Natural keys versus complex keys

SQL Triggers and Stored Procedures

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

[Excel: The most complete](#)