

MARKETING & COMMUNICATION | COURSE BROCHURE

Marketing Automation and CRM

5 days | Classroom training | English

SMART HORIZON

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Course content

Why attend

Marketing automation and CRM systems help organisations nurture leads and personalise communication at scale. This course covers lead scoring, segmentation, automated journeys, email workflows, CRM data quality, sales and marketing handover, platform selection and measuring automation performance.

Many companies buy automation platforms but use only basic email features. You will learn to get real value from marketing automation and CRM.

Professional Problems This Course Is Designed to Solve

• Difficulty translating subject knowledge into practical workplace decisions.
• Inconsistent approaches to the activities covered in the course outline.
• Lack of a structured plan for applying and reviewing new skills.

Course methodology

Workflow design exercises, lead scoring workshops, platform demonstrations and case studies.

Course objectives

By the end of this course, participants will be able to:
• Explain marketing automation and CRM concepts
• Design segmentation and lead scoring
• Build automated nurture journeys
• Maintain CRM data quality
• Align sales and marketing handover
• Measure automation results

Target audience

This course is suitable for:
• Marketing operations professionals
• CRM managers
• Digital marketers
• Sales operations staff
• Marketing managers



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Target competencies

Participants will develop competencies in:

- Lead scoring
- Journey design
- Data quality
- Sales alignment
- Performance measurement

Course outline

Day 1: Automation and CRM

09:00–10:08	Concepts and platforms
10:08–11:00	Use cases
11:00–11:30	**Coffee break**
11:30–11:45	Use cases (continued)
11:45–12:53	Maturity
12:53–14:00	Exercise

Day 2: Segmentation and Scoring

09:00–10:08	Segmentation
10:08–11:00	Lead scoring models
11:00–11:30	**Coffee break**
11:30–11:45	Lead scoring models (continued)
11:45–12:53	Data requirements
12:53–14:00	Workshop

Day 3: Journeys

09:00–10:08	Nurture journeys
10:08–11:00	Triggers
11:00–11:30	**Coffee break**



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11:30–11:45	Triggers (continued)
11:45–12:53	Personalisation
12:53–14:00	Exercise

Day 4: CRM and Sales Alignment

09:00–10:08	Data quality
10:08–11:00	Lead handover
11:00–11:30	**Coffee break**
11:30–11:45	Lead handover (continued)
11:45–12:53	Service level agreements
12:53–14:00	Case study

Day 5: Measurement

09:00–10:08	Funnel metrics
10:08–11:00	Optimisation
11:00–11:30	**Coffee break**
11:30–11:45	Optimisation (continued)
11:45–12:53	Platform roadmap
12:53–14:00	Action plan

The timings provided are estimates and may vary depending on the number of participants and the discussions taking place during the sessions. They are indicative only and do not constitute a binding commitment.



Course content

Dates, venues and fees

Current published course plans. Fees are per participant in EUR, excluding unconfirmed taxes.

Venue	Start date	End date	Fee (EUR)
Cape Town Confirmed dates	23 Nov 2026	27 Nov 2026	**€1,890.–**
Online Confirmed dates	23 Nov 2026	27 Nov 2026	**€1,250.–**
Dubai Confirmed dates	14 Dec 2026	18 Dec 2026	**€3,150.–**
Online Confirmed dates	14 Dec 2026	18 Dec 2026	**€1,250.–**
London Confirmed dates	11 Jan 2027	15 Jan 2027	**€2,450.–**
Online Confirmed dates	11 Jan 2027	15 Jan 2027	**€1,250.–**
Kuala Lumpur Confirmed dates	1 Feb 2027	5 Feb 2027	**€1,450.–**
Online Confirmed dates	1 Feb 2027	5 Feb 2027	**€1,250.–**
Dubai Confirmed dates	22 Feb 2027	26 Feb 2027	**€3,150.–**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (EUR)
Online Confirmed dates	22 Feb 2027	26 Feb 2027	**€1,250.–**
Cape Town Confirmed dates	15 Mar 2027	19 Mar 2027	**€1,890.–**
Online Confirmed dates	15 Mar 2027	19 Mar 2027	**€1,250.–**
Rome Confirmed dates	5 Apr 2027	9 Apr 2027	**€2,450.–**
Online Confirmed dates	5 Apr 2027	9 Apr 2027	**€1,250.–**
Barcelona Confirmed dates	19 Apr 2027	23 Apr 2027	**€2,840.–**
Online Confirmed dates	19 Apr 2027	23 Apr 2027	**€1,250.–**
Dubai Confirmed dates	10 May 2027	14 May 2027	**€3,150.–**
Online Confirmed dates	10 May 2027	14 May 2027	**€1,250.–**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (EUR)
Paris Confirmed dates	31 May 2027	4 Jun 2027	**€2,860.–**
Online Confirmed dates	31 May 2027	4 Jun 2027	**€1,250.–**
Barcelona Confirmed dates	21 Jun 2027	25 Jun 2027	**€2,840.–**
Online Confirmed dates	21 Jun 2027	25 Jun 2027	**€1,250.–**
Frankfurt Confirmed dates	12 Jul 2027	16 Jul 2027	**€2,650.–**
Online Confirmed dates	12 Jul 2027	16 Jul 2027	**€1,250.–**
London Confirmed dates	26 Jul 2027	30 Jul 2027	**€2,450.–**
Online Confirmed dates	26 Jul 2027	30 Jul 2027	**€1,250.–**
Rome Confirmed dates	16 Aug 2027	20 Aug 2027	**€2,450.–**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (EUR)
Online Confirmed dates	16 Aug 2027	20 Aug 2027	**€1,250.-**
Istanbul Confirmed dates	6 Sept 2027	10 Sept 2027	**€2,650.-**
Online Confirmed dates	6 Sept 2027	10 Sept 2027	**€1,250.-**
Amsterdam Confirmed dates	27 Sept 2027	1 Oct 2027	**€2,540.-**
Online Confirmed dates	27 Sept 2027	1 Oct 2027	**€1,250.-**
Vienna Confirmed dates	18 Oct 2027	22 Oct 2027	**€2,940.-**
Online Confirmed dates	18 Oct 2027	22 Oct 2027	**€1,250.-**
Rome Confirmed dates	1 Nov 2027	5 Nov 2027	**€2,450.-**
Online Confirmed dates	1 Nov 2027	5 Nov 2027	**€1,250.-**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (EUR)
Cape Town Confirmed dates	22 Nov 2027	26 Nov 2027	**€1,890.-**
Online Confirmed dates	22 Nov 2027	26 Nov 2027	**€1,250.-**
Vienna Confirmed dates	13 Dec 2027	17 Dec 2027	**€2,940.-**
Online Confirmed dates	13 Dec 2027	17 Dec 2027	**€1,250.-**

Plan your next step

Dates, availability, exact venue, taxes, inclusions and payment terms require written confirmation. This brochure is not a quotation, registration, booking confirmation or visa invitation. Participants receive a Smart Horizon certificate of attendance; programmes are not externally accredited and do not award a professional qualification or designation. Confirm arrangements before booking travel.

For group or in-house training, contact our learning team to discuss your objectives and delivery arrangements.

Contact Smart Horizon

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View the latest course details online