



Certified in Planning and Inventory Management

Customer Relationship
Management



CPIM On-Demand Training for Self-Study Professionals

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Customer Relationship Management

1. Strategic Role of CRM in Supply Chain

CRM is a strategic approach that integrates customer-focused processes across sales, marketing, customer service, and supply chain operations. It aims to build long-term, profitable customer relationships by understanding customer needs, preferences, and behaviors. In supply chain planning, CRM helps ensure demand insights are accurate and customer priorities are aligned with operational capabilities. CPIM focuses on how CRM supports segmentation, demand shaping, trust-building, and improved service performance. It enables organizations to shift from transactional interactions to relationship-driven value creation, improving customer retention and overall business competitiveness.

2. Customer Segmentation and Priority Setting

Segmentation divides customers into meaningful groups based on revenue, volume, profitability, service needs, and strategic value. Common methods include ABC classification, profitability tiers, and needs-based segmentation. In CPIM, segmentation is critical because it informs differentiated service levels, inventory policies, order promising rules, and allocation decisions during shortages. Understanding segmentation helps planners know which customers should receive priority when capacity or inventory is constrained. Proper segmentation enhances customer satisfaction, reduces service costs, and aligns service strategies with business objectives.

3. Voice of the Customer (VOC)

VOC represents customer needs, expectations, and feedback captured through surveys, interviews, complaints, service interactions, and behavioral data. VOC is vital in CPIM because it helps improve demand forecasts, refine product specifications, and optimize service offerings. Effective VOC processes ensure customer concerns are systematically analyzed and acted upon, feeding into continuous improvement initiatives. It strengthens cross-functional alignment by converting customer insights into actionable operational and product strategies. VOC enables companies to proactively address dissatisfaction and build loyalty.

4. Customer Lifetime Value (CLV)

CLV measures the total net profit expected from a customer throughout the business relationship. It helps organizations decide where to invest in service, marketing, product customization, and supply chain support. CPIM highlights CLV because it supports prioritization in demand management, capacity allocation, and customer service policies. High-value customers may require premium service levels, shorter lead times, or personalized communication. Understanding CLV enables more efficient resource allocation, reduces churn, and maximizes long-term profitability.

5. CRM Data Management and Quality

Accurate customer data is essential for forecasting, service-level planning, order management, and performance measurement. Effective CRM requires clean, consistent, integrated data across ERP, order systems, and service

platforms. CPIM emphasizes understanding how data errors—such as duplicate records or inaccurate order histories—can distort forecasts, cause supply chain disruptions, or misinform service decisions. Good CRM data management supports segmentation, demand analysis, and customer satisfaction improvements. It ensures visibility across departments and drives reliable decision-making.

6. CRM Technology and System Integration

CRM technologies include software tools that manage customer information, interactions, and analytics.

Integration with ERP, APS, and demand planning systems ensures seamless information flow across the supply chain.

CPIM focuses on how CRM tools improve order management, communication, service visibility, and demand insight accuracy. Technologies like automated workflows, dashboards, and AI-driven analytics enhance forecasting inputs and real-time responsiveness. Integrated CRM supports smoother planning, fewer service failures, and higher customer loyalty.

7. Customer Service Policies and Standards

Service policies define how the company responds to customer needs regarding lead times, order accuracy, delivery reliability, communication, and after-sales support.

CPIM stresses the importance of aligning policies with supply chain capabilities and customer expectations. Clear service standards support efficient order promising, performance measurement, and customer satisfaction.

They help manage variability, reduce misunderstandings, and ensure consistency across regions or teams. Properly designed policies balance cost, responsiveness, and quality while maintaining competitiveness.

8. Customer-Focused Demand Management

This concept ensures demand planning incorporates customer behavior, collaborative forecasting insights, contractual commitments, and promotional plans. CRM provides valuable qualitative inputs to demand planners, improving forecast accuracy and reducing bias. CPIM emphasizes that customer-focused demand management strengthens communication between sales, marketing, and operations. It supports better alignment between customer needs and supply chain capabilities. As a result, companies experience fewer stockouts, lower inventory costs, and more reliable service performance.

9. Order Fulfillment and CRM Linkages

Order fulfillment relies on integrated CRM data to ensure accurate order entry, status updates, delivery scheduling, and communication. For CPIM, understanding how CRM enhances visibility across the order-to-cash cycle is key. It helps companies manage exceptions, provide proactive updates, and resolve issues quickly. CRM also connects customer commitments with production and inventory planning, ensuring order reliability. Effective integration reduces errors, improves on-time delivery, and enhances customer satisfaction.

10. Customer Service Channels

CRM includes multiple communication channels, such as call centers, email, chat, self-service portals, EDI, and field support. CPIM examines how multichannel communication supports order accuracy, problem resolution, and service speed. Each channel has different cost structures and service expectations. Managing channels effectively helps

businesses provide consistent, high-quality service while optimizing resource use. Understanding channel preferences also supports better segmentation and planning.

11. Returns, Reverse Logistics, and Customer Satisfaction

Reverse logistics deals with returns, warranty claims, repairs, and recycling. CRM plays a role by providing clear processes, communication, and data on return reasons. For CPIM, reverse logistics is essential because it affects inventory accuracy, costs, service perceptions, and product quality improvement. Efficient returns management helps maintain customer trust, reduce operational waste, and identify design or quality issues. CRM ensures customer concerns are addressed quickly and transparently.

12. Relationship Marketing and Customer Loyalty

Relationship marketing focuses on long-term engagement rather than short-term transactions. It includes loyalty programs, personalized service, proactive communication, and value-added offerings. CPIM emphasizes loyalty's link to stable demand, reduced churn, and more predictable forecasts. Loyal customers often require fewer service resources and are more profitable. CRM systems help track interactions, preferences, and behavior, enabling tailored strategies that reinforce long-term relationships.

13. Customer Satisfaction Measurement

Measuring satisfaction involves surveys, Net Promoter Score (NPS), customer effort score, and service metrics such as on-time delivery or fill rate. CPIM highlights how satisfaction data feeds into continuous improvement, demand shaping,

and service-level adjustments. Poor satisfaction indicators may reveal supply chain bottlenecks, quality issues, or communication gaps. Monitoring satisfaction helps avoid churn and ensures alignment between customer expectations and operational performance.

14. CRM Performance Metrics and Dashboards

CRM metrics include customer retention, churn rate, sales conversion, service response time, complaint resolution time, and customer profitability. Dashboards provide real-time visibility to cross-functional teams, supporting faster decisions. CPIM stresses that these metrics link directly to demand planning, inventory management, and service policies. Understanding metrics ensures companies evaluate the effectiveness of CRM strategies and adjust tactics accordingly. It also promotes accountability and transparency.

15. Customer Collaboration Programs

These programs include vendor-managed inventory (VMI), collaborative planning, forecasting, and replenishment (CPFR), and joint business planning (JBP). Collaboration improves data sharing, forecast accuracy, and supply-demand alignment. For CPIM, collaboration represents a key driver of responsive, resilient supply chains. It helps reduce bullwhip effects, prevent stockouts, and optimize inventory levels. CRM is the foundation for building trust and facilitating these partnerships.

16. Managing Customer Expectations

CRM helps set realistic expectations regarding delivery time, product availability, service levels, and pricing. CPIM focuses

on expectation alignment because mismatches cause dissatisfaction, lost sales, and operational stress. Transparent communication, accurate ATP (available-to-promise) information, and proactive issue resolution support expectation management. It allows companies to balance service and cost while protecting brand reputation.

17. Conflict Resolution and Issue Management

Customers experience issues such as late shipments, incorrect orders, and product defects. CRM provides structured processes for logging, investigating, and resolving these issues. CPIM examines how effective issue management reduces disruptions, improves customer trust, and prevents recurrence. Quick resolution also protects revenue and limits customer dissatisfaction. Root-cause analysis ensures systemic improvements.

18. CRM and Product Innovation

Customer feedback and behavioral data help shape new product development, product improvements, and design changes. CPIM recognizes CRM as a critical input to product life-cycle management, as customers often reveal unmet needs and emerging trends. Integrating CRM with product development reduces launch risks, improves forecast accuracy, and increases market success. Companies benefit from more demand-driven innovation.

19. CRM's Role in Supply Chain Resilience

CRM contributes to resilience by enabling clear communication during disruptions, understanding customer risk tolerance, and prioritizing critical customers. CPIM highlights the role of CRM in managing shortages,

reallocating inventory, and coordinating recovery strategies. Strong relationships help organizations mitigate disruption impact and maintain service levels. Customers value transparency and reliability during uncertain periods.

20. Continuous Improvement in CRM

CRM requires ongoing evaluation and improvement of processes, technologies, service policies, and communication methods. CPIM emphasizes adopting feedback loops, benchmarking, and data-driven improvements. Continuous improvement enhances responsiveness, customer satisfaction, and operational efficiency. It ensures CRM continues supporting evolving market demands, customer expectations, and organizational strategies. This helps sustain competitive advantage.

Micro-Learning Programs in Supply Chain Management & Procurement



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Micro-Learning Programs in Supply Chain Management



1. Fundamentals of Supply Chain Management
2. Supply Chain Planning and Optimization
3. Demand Forecasting Techniques
4. Inventory Control and Management
5. Distribution and Logistics Strategy
6. Warehouse Layout and Operations Efficiency
7. Supply Chain Risk Management
8. Supply Chain Performance Metrics (KPIs)
9. Lean Supply Chain Practices
10. Agile and Responsive Supply Chains
11. Sales and Operations Planning (S&OP)
12. Supply Chain Network Design
13. Supply Chain Digital Transformation
14. AI and Data Analytics in Supply Chain
15. Supply Chain Sustainability and Green Logistics
16. Reverse Logistics and Returns Management
17. Supply Chain Collaboration and Integration
18. Supplier Relationship Management in SCM
19. Global Supply Chain Strategy
20. Transportation Management Systems (TMS)
21. Inventory Optimization Models
22. Demand-Driven MRP (DDMRP) Concepts
23. Blockchain Applications in Supply Chain
24. Supply Chain Cost Reduction Techniques
25. SCOR Model and Process Improvement

Micro-Learning Programs in Supply Chain Management ...



26. Capacity Planning and Resource Allocation
27. Managing Supply Chain Disruptions
28. End-to-End Supply Chain Visibility
29. Cold Chain Logistics Management
30. Supply Chain Compliance and Ethics
31. Import–Export Procedures and Documentation
32. Managing Third-Party Logistics (3PL) Providers
33. Supply Chain Collaboration Technologies
34. Production Planning and Scheduling
35. Strategic Supply Chain Design Using Case Studies
36. Circular Economy in Supply Chain
37. Vendor-Managed Inventory (VMI)
38. Transportation Optimization Techniques
39. E-Commerce Supply Chain Models
40. Omni-Channel Fulfillment Strategies
41. Warehouse Automation and Robotics
42. SCOR DS Roadmap for Supply Chain Excellence
43. Customer-Centric Supply Chain Strategies
44. Supply Chain Finance and Working Capital Management
45. Supply Chain Data Visualization Using Power BI
46. Strategic Sourcing in Supply Chain Context
47. Supply Chain Benchmarking and Best Practices
48. Integrated Business Planning (IBP)
49. Supply Chain in Crisis Management and Recovery
50. Future Trends and Technologies in Supply Chain

Micro-Learning Programs in Procurement



1. Fundamentals of Procurement Management
2. Strategic Sourcing and Category Management
3. Supplier Selection and Evaluation
4. Contract Management Essentials
5. Cost and Price Analysis in Procurement
6. Negotiation Strategies for Procurement Professionals
7. E-Procurement and Digital Tools
8. Procurement Planning and Budgeting
9. Risk Management in Procurement
10. Supplier Relationship and Performance Management
11. Sustainable and Ethical Procurement
12. Total Cost of Ownership (TCO) Analysis
13. Make-or-Buy Decision Frameworks
14. Procurement Policies and Governance
15. Procurement in Public vs. Private Sectors
16. Procurement Audit and Compliance
17. Procurement Data Analytics and Reporting
18. Procurement Scorecards and KPIs
19. Strategic Supplier Partnerships
20. Category Strategy Development
21. Managing Global and Offshore Procurement
22. Negotiation Simulation Workshop
23. Contract Law for Procurement Managers
24. Cost Reduction Strategies in Procurement
25. Supplier Risk Assessment Models

Micro-Learning Programs in Procurement ...



26. Procurement Process Mapping and Improvement
27. Procurement Automation and AI Applications
28. Managing Procurement Teams Effectively
29. Procurement Ethics and Transparency
30. Procurement in the Digital Supply Chain
31. Vendor Consolidation Strategies
32. Spend Analysis and Optimization
33. Demand Forecasting for Procurement
34. E-Auction and Reverse Bidding Techniques
35. Inventory and Procurement Alignment
36. Procurement in Project-Based Organizations
37. Supplier Onboarding and Development
38. Procurement Market Intelligence
39. Measuring Supplier Innovation
40. Procurement in Times of Supply Disruption
41. Cross-Functional Collaboration in Procurement
42. Writing Effective RFPs, RFQs, and RFIs
43. Contract Negotiation Best Practices
44. Green Procurement and Circular Economy
45. Legal Aspects of Procurement Contracts
46. Performance-Based Contracting
47. Procurement Leadership and Strategic Influence
48. Cost Avoidance and Value Creation in Procurement
49. Managing Procurement with Power BI Dashboards
50. Future Skills and Trends in Procurement



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