



Excellence in Customer Insights and Business Analysis: A Dual Path to Mastery

27 - 31 Jan 2026
San Diego



Excellence in Customer Insights and Business Analysis: A Dual Path to Mastery

Ref.: 36357_53695 **Date:** 27 - 31 Jan 2026 **Location:** San Diego **Fees:** 14000 **Euro**

Course Overview:

The course is a complete course designed to develop skills in customer relationship management and business analysis. Participants will learn to foster a customer-centric culture, communicate effectively, and implement quality assurance methods to improve customer satisfaction. This course also provides in-depth training for the PMI-PBA, covering essential business analysis skills such as needs assessment, requirements elicitation, traceability, and solution evaluation.

Target Audience:

- Customer Service Professionals
- Business Analysts
- Project Managers
- Team Leaders & Supervisors
- Sales and Marketing Professionals
- Aspiring Customer Service Leaders

Targeted Organizational Departments:

- Customer Service
- Project Management Office PMO
- Business Analysis
- Sales and Marketing
- IT and Software Development
- Human Resources

Targeted Industries:

- Retail
- IT and Software
- Finance and Banking
- Healthcare
- Telecommunications
- Hospitality



Course Offerings:

By the end of this course, participants will be able to:

- Develop a customer-centric organizational strategy.
- Master communication and customer engagement techniques.
- Apply agile methods in customer service.
- Conduct comprehensive needs assessments.
- Elicit and analyze requirements for business solutions.
- Implement quality assurance in customer service.

Training Methodology:

The course uses varied learning approaches to ensure an engaging and practical experience. Participants will engage in case studies, group work, interactive discussions, and feedback sessions focused on customer service excellence and business analysis. Real-world scenarios and simulations are used to apply key concepts in a hands-on environment, and mock exams will be provided for PMI-PBA preparation. This multi-method training ensures that participants can apply their new skills directly in their roles.

Course Toolbox:

Participants will receive:

- Comprehensive ebooks on customer service and business analysis
- Access to online resources for PMI-PBA preparation
- Templates, checklists, and agile tools for customer engagement

Course Agenda:

Day 1: Building a Customer-Centric Culture

- **Topic 1:** Importance of Customer-Centric Strategy
- **Topic 2:** The Shift Towards Customer-Centric Organizations
- **Topic 3:** Customer-Centric Model and Approach
- **Topic 4:** Agile Concepts in Customer Service
- **Topic 5:** Encouraging Customer Involvement in Decision-Making
- **Topic 6:** Incorporating Customer Feedback into Strategy
- **Reflection & Review:** Key takeaways on customer centricity



Day 2: Developing Customer Communication and Engagement

- **Topic 1:** Foundations of Effective Communication
- **Topic 2:** Advanced Communication Skills for Customer Service
- **Topic 3:** The Art of Listening and Understanding Customer Needs
- **Topic 4:** Building Trust and Loyalty through Communication
- **Topic 5:** Techniques for Personal Persuasion and Influence
- **Topic 6:** Crafting a Customer Communication Plan
- **Reflection & Review:** Techniques and applications review

Day 3: Agile and Analytical Approaches in Service and Business Analysis

- **Topic 1:** Introduction to Agile Customer Service
- **Topic 2:** Moving from Transactions to Interactions
- **Topic 3:** Enhancing Customer Experience through Details
- **Topic 4:** Business Analysis Planning and Agile Integration
- **Topic 5:** Requirements Elicitation and Stakeholder Involvement
- **Topic 6:** Customer Service Protocols and Standards
- **Reflection & Review:** Agile and analytical concept review

Day 4: Quality Assurance, Control, and Business Analysis Techniques

- **Topic 1:** Quality Assurance in Customer Service
- **Topic 2:** Applying Poka Yoke for Error Prevention
- **Topic 3:** Business Analysis Traceability and Monitoring
- **Topic 4:** Continuous Improvement and KPI Development
- **Topic 5:** Balanced Scorecard for Customer and Financial Alignment
- **Topic 6:** Conducting Basic Customer Analysis
- **Reflection & Review:** Quality and performance review

Day 5: Solution Evaluation and Developing Customer Service Teams

- **Topic 1:** Understanding Solution Evaluation and Decision-Making
- **Topic 2:** Coaching and Mentoring in Customer Service
- **Topic 3:** Steps to Foster a Learning Organization
- **Topic 4:** Conflict Resolution in Business Analysis
- **Topic 5:** Building a Sustainable Customer-Centric Team
- **Topic 6:** PMI-PBA Exam Prep and Final Review
- **Reflection & Review:** Final reflections and ongoing application



How This Course is Different from Other Excellence in Customer Insights and Business Analysis Courses:

This course uniquely combines customer relationship management skills and business analysis expertise. Unlike other programs, this course not only covers strategies for creating a customer-centric culture. By focusing on both customer service and analytical skills, the course empowers participants to create meaningful customer experiences and make data-driven business decisions, making them valuable assets to their organizations.

Training Course Categories



Finance and Accounting Training Courses



Agile PM and Project Management Training Courses



Certified Courses By International Bodies



Communication and Public Relations Training Courses



Data Analytics Training and Data Science Courses



Environment & Sustainability Training Courses



Governance, Risk and Compliance Training Courses



Human Resources Training and Development Courses



IT Security Training & IT Training Courses



Leadership and Management Training Courses



Legal Training, Procurement and Contracting Courses



Maintenance Training and Engineering Training Courses



Training Course Categories



Marketing, Customer Relations, and Sales Courses



Occupational Health, Safety and Security Training Courses



Oil & Gas Training and Other Technical Courses



Personal & Self-Development Training Courses



Quality and Operations Management Training Courses



Secretarial and Administration Training Courses



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Training Cities



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Bali - Indonesia



Bangkok - Thailand



Barcelona - Spain



Cairo - Egypt



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Munich - Germany



Nairobi - Kenya



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**Prague - Czech
Republic**



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San Diego - USA



**Sharm El-Sheikh -
Egypt**



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Zanzibar - Tanzania



**Zoom - Online
Training**

WHO WE ARE

Agile Leaders is a renowned training center with a team of experienced experts in vocational training and development. With 20 years of industry experience, we are committed to helping executives and managers replace traditional practices with more effective and agile approaches.

OUR VISION

We aspire to be the top choice training provider for organizations seeking to embrace agile business practices. As we progress towards our vision, our focus becomes increasingly customer-centric and agile.

OUR MISSION

We are dedicated to developing value-adding, customer-centric agile training courses that deliver a clear return on investment. Guided by our core agile values, we ensure our training is actionable and impactful.

WHAT DO WE OFFER

At Agile Leaders, we offer agile, bite-sized training courses that provide a real-life return on investment. Our courses focus on enhancing knowledge, improving skills, and changing attitudes. We achieve this through engaging and interactive training techniques, including Q&As, live discussions, games, and puzzles.



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