

8522 - Microsoft® CRM 3.0 Marketing Automation

IN BRIEF

Delivery: Instructor-led course

Duration: One day

Class size: 10 Students Max.

Cost: \$850 per person + GST

Inclusions: Microsoft expert instructor, comprehensive course manual, individual computer access, and fully catered lunch, morning and afternoon tea breaks.

Prerequisites: General knowledge of Microsoft Windows and an understanding of Customer Relationship Management solution processes and practices.

Products Covered: Microsoft CRM 3.0

Previous Training: None

Course Description

This one-day, instructor-led course explores the Microsoft CRM application from a user's perspective. Functionality covered in the course includes core CRM navigation, user interface, outlook client and the marketing automation module. It is designed to teach the processes and functionality used by marketing managers and marketing representatives, beginning with an introduction to the core concepts of Microsoft CRM and then giving an overview of the marketing automation processes. Using a hands-on approach, learners will gain a thorough understanding of the marketing processes in Microsoft CRM.

Audience

This course is recommended for individuals who need to implement, use, maintain, consult or support Microsoft CRM within their organisation. The session is targeted toward marketing representatives who need to understand the technical aspects of Microsoft CRM and gain foundation knowledge to the application functionality.

Topics Covered

Microsoft CRM Concepts

- Microsoft CRM Modules
- Accessing Microsoft CRM
- Customer records
- Customer relationships
- Understanding customisation availability

Microsoft CRM Client for Outlook

- Functionality available
- Navigation within the user interface
- Creating CRM records and activities in Outlook
- Managing CRM records and activities in Outlook

Marketing Automation Life Cycle

- Features and processes of marketing campaigns
- Marketing automation process flow
- Marketing process demonstration
- Solving business problems with Microsoft CRM

Planning Marketing Campaigns

- Marketing campaigns
- Planning a campaign
- Tasks and information
- Managing lists
- Using lists

Campaign Creation

- Creating a campaign
- Creating a campaign template
- Managing and testing a campaign pre-launch

Campaign Execution & Response Management

- Executing a campaign
- Running and managing campaigns
- Tracking marketing information
- Quick campaigns