

Microsoft CRM EU: 4.0 for Marketing Professionals

Vendor Course Code: MSCRMARK

Course Length: 1 day

Overview: This one-day instructor-led course provides students with the knowledge and skills to enhance their marketing capabilities by using the key features marketing automation. The key is to effectively slice and dice information and enhance revenue base. Students will also get practical marketing advice from an expert in the field.

Skills Gained: After completing this course, students will be able to:

- Planning and budgeting tasks related to marketing campaigns
- Create and manage customer lists
- Create marketing campaigns
- Manage campaigns and track campaign responses
- Account, Contact, and Activity record management

Key Topics:

Course Outline

Module 1: Module Specific Navigation

- 1.1 Navigating Workplace
- 1.2 Navigating Marketing

Module 2: Quick Campaigns

- 2.1 Quick Campaigns
- 2.2 Mail merging and Direct Email

Module 3: Marketing Campaigns

- 3.1 Creating a marketing list
- 3.2 Executing Campaign
- 3.3 Campaign Tasks
- 3.4 Campaign Activities
- 3.5 Response Management

Module 4: Advanced marketing for CRM

- 4.1 Demonstration of Marketing Automation in MSCRM
- 4.2 What is Engagement Marketing?
- 4.3 MSCRM capabilities v. limitations
- 4.4 Multi-channel communications
- 4.5 Lead Management.
 - 4.5.1 Lead Scoring
 - 4.5.2 Lead Nurturing – evolving prospects into customers for life
 - 4.5.3 Web Tracking

Module 5: Reporting and Analytics

- 5.1 Demonstration of Marketing Automation in MSCRM
- 5.2 The Reporting Wizard
- 5.3 Introduction to Out of Box Reports
- 5.4 Introduction to Some Customised Reports
- 5.5 Dashboards

Target Audience: Marketing users of CRM 4.0

Prerequisites:

Microsoft CRM EU: 4.0 Introduction