

## **Course 80290A: Marketing Automation in Microsoft Dynamics CRM 2011**

Length: 1 Days  
Published: May 12, 2011  
Language(s): English  
Audience(s): Information Workers  
Level: 200  
Technology: Microsoft Dynamics CRM 2011  
Type: Course  
Delivery Method: Instructor-led (classroom)

### **OVERVIEW**

#### **About this Course**

This course introduces you on how to use Microsoft Dynamics CRM to extend the effectiveness of your marketing department and provides context of how to use things such as marketing campaigns, marketing lists, and campaign templates in Microsoft Dynamics CRM. It also discusses the role of campaign activities and marketing lists in campaigns and discusses how to associate sales literature, target products and price lists with marketing campaigns.

#### **Audience Profile**

This course is designed for new partners and customers of Microsoft Dynamics CRM that want to learn about the available marketing features in the Microsoft Dynamics CRM product.

#### **At Course Completion**

After completing this course, students will be able to:

- Examine the benefits of closed loop marketing
- Create and use marketing lists
- Introduce quick campaigns and marketing campaigns
- Plan marketing campaigns and create and use templates
- Import leads
- Associate sales literature, target products and price lists with marketing campaigns
- Capture and manage campaign responses
- Create and manage sales goals for individuals and teams within your organization
- Use Personal Charts, System Charts, and Dashboards to analyze marketing information

## COURSE OUTLINE

### Module 1: Introduction

This module introduces you on how to use Microsoft Dynamics CRM to extend the effectiveness of your marketing department and provides context of how to use things such as marketing campaigns, marketing lists, and campaign templates in Microsoft Dynamics CRM.

#### Lessons

- Benefits of Closed Loop Marketing
- Creating and Using Marketing Lists
- Marketing Campaigns and Quick Campaigns
- Quick Campaigns
- Introduction to Marketing Campaigns
- Creating a Marketing Campaign
- Creating and Using Campaign Templates
- Importing Leads

#### Lab : Quick Campaigns

##### Lab : Create a Marketing Campaign

After completing this module, students will be able to:

- Identify the benefits of closed loop marketing.
- Create and use marketing lists.
- Identify when to use a quick campaign or a marketing campaign.
- Examine the purpose of quick campaigns and the key steps to create one.
- Review the purpose and elements of marketing campaigns.
- Planning marketing campaigns.
- Create and use campaign templates.
- Import Leads from Microsoft Office Excel files.

### Module 2: Implementing and Managing Marketing Campaigns

This module discusses the role of campaign activities and marketing lists in campaigns. It also discusses how to associate sales literature, target products and price lists with marketing campaigns.

## **Module 2 (cont'd):**

### **Lesson**

- Campaigns, Campaign Activities and Marketing Lists
- Creating and Using Email Templates
- Sales Literature, Products and Price Lists
- Distributing Campaign Activities
- Capturing and Viewing Campaign Responses
- Working with Campaign Responses

### **Lab : Create a Campaign Response**

After completing this module, students will be able to:

- Understand the role of campaign activities and marketing lists in campaigns.
- Create and use Email Templates for use in marketing campaigns.
- Associate sales literature, target products and price lists with marketing campaigns.
- Distribute campaign activities.
- Capture and manage campaign responses.

## **Module 3: Analysis, Reporting and Goals**

This module discusses the built-in marketing reports that can be used to review campaign performance and compare campaigns. It also explains how to create and manage sales goals within the organization.

### **Lessons**

- Analyzing Marketing Information with Lists, Views and Charts
- Working with Reports
- Creating and Managing Marketing Goals
- Creating Charts
- Customizing and Working with Dashboards

### **Lab : Create a Personal Chart for Appointments**

### **Lab : Goal Management**

After completing this module, students will be able to:

- Use Lists, Views and Charts to gain insight into important sales information.
- Use the built-in marketing reports to review campaign performance and compare campaigns.
- Create custom reports with the Report Wizard.
- Create and manage sales goals for individuals, teams, and the organization.
- Analyze marketing information with Personal Charts and System Charts.
- Use Dashboards to analyze marketing information.

## **PREREQUISITES**

**Before attending this course, students must have:**

- General working knowledge of customer relationship management
- General understanding of business processes
- General working knowledge of Microsoft Windows.