



Course Syllabus

Microsoft CRM Marketing Automation

Key Data

Course number: 8522A

Number of Days: 1

Available: November 2005

Languages:

- US English

Format:

- Instructor-Led Training (lecture and labs)

Student Materials:

- Student Courseware

Certification Exam:

This course helps to prepare for the

This course syllabus should be used to determine whether the course is appropriate for the students, based on their current skills and technical training needs.

Course content, prices, and availability are subject to change without notice.

Key Related Courses:

Microsoft CRM Installation and Configuration, 8523

Microsoft CRM Customization, 8525

Microsoft CRM Sales Management, 8521

Microsoft CRM Service Management, 8523

Microsoft CRM Service Scheduling, 8524

Introduction

This one-day course explores the Microsoft® CRM application from a user's perspective. Application functionality covered in the course includes:

- Core CRM Navigation
- User Interface
- Outlook Client
- Marketing Automation module

This application course does not include materials or instructor discussion of Microsoft CRM Installation, Application Configuration, Workflow Configuration, Customization, Back Office Integration, or Data Migration.

This course teaches the processes and functionality used by marketing managers and marketing representatives. It begins with an introduction to the core concepts of Microsoft CRM and then an overview of the marketing automation processes. Subsequent lessons explore the marketing concepts in greater detail. A thorough understanding of the marketing processes in Microsoft CRM helps you to get the most out of your system.

Audience

Microsoft CRM Marketing Automation training is recommended for individuals or anyone that plans to implement, use, maintain, consult, or support Microsoft CRM in their organization. The class is targeted toward marketing representatives, administrators, office managers, CEO's, and consultants who need to understand the technical aspects of Microsoft CRM and gain foundational knowledge of the application functionality.

At Course Completion

After completing this course, students should understand:

- Microsoft CRM User Interface and application terminology
- Basic and advanced navigation and record maintenance
- Microsoft CRM Client for Outlook functionality and synchronization
- Planning and budgeting tasks related to marketing campaigns
- Create and manage customer lists
- Create marketing campaigns
- Manage campaigns and track campaign responses

Prerequisites

Before attending this course, students must have:

- General knowledge of Microsoft® Windows®
- An understanding of Customer Relationship Management solution processes and practices

For a referral to a Microsoft Certified Partner Learning Solution in your area, see the Microsoft Training and Certification Web site at <http://www.microsoft.com/traincert>. Call your local Microsoft Certified Partner Learning Solution for more information and to register for classes.

Student Materials

The student materials include comprehensive courseware and other necessary materials for this class.

Chapter 1: Microsoft CRM Concepts

This chapter describes the overall solution of Microsoft CRM and the benefits to an organization.

Main Topics
<ul style="list-style-type: none">Microsoft CRM ModulesAccessing Microsoft CRMCustomer RecordsCustomer RelationshipsUnderstanding customization availability
Labs
<ul style="list-style-type: none">Working with RecordsAccounts and Contacts

After completing this chapter, students should be able to:

- Identify the overall solution that Microsoft® Dynamics CRM® provides
- Identify the functionality and purpose of the Microsoft CRM modules
- Log on to Microsoft CRM
- Recognize the relationship between account and contact records in Microsoft CRM
- Identify the types of relationships that can be created between records

Chapter 2: Microsoft CRM Client for Outlook

This chapter examines how the Microsoft CRM Client for Outlook works, how the functionality is similar to the web client, and how to work in the Outlook Client interface.

Main Topics
<ul style="list-style-type: none">Identifying the functionality available in the Microsoft CRM Client for OutlookNavigate within the Microsoft CRM client for Outlook user interfaceNavigate within the Microsoft CRM client for Outlook user interfaceCreate and manage Microsoft CRM records and activities in Outlook
Labs
<ul style="list-style-type: none">Synchronization in the Outlook clientOutlook client Record management and E-mail management

After completing this chapter, students should be able to:

- Identify the functionality available in the Microsoft CRM Outlook client.
- Be familiar with navigating the user interface of the Microsoft CRM Outlook client.
- Recognize how the Outlook client synchronizes with Microsoft Outlook and the Microsoft CRM Server

- Be familiar with how to take the Outlook client offline and online.
- Recognize how to differentiate between Microsoft CRM and Outlook records and how the different record types are managed in the Outlook client.
- Recognize how to create mail merge documents for the available record types in the Microsoft CRM Outlook client.

Chapter 3: Marketing Automation Life Cycle

This chapter goes through an entire marketing campaign to provide an overview of the key features and processes. The focus is on procedural introduction, therefore, the marketing processes are completed but not discussed in great detail.

Main Topics
<ul style="list-style-type: none">▪ Marketing Automation Process Flow▪ Marketing process demonstration
Labs
<ul style="list-style-type: none">▪ Microsoft CRM

After completing this chapter, students should be able to understand the business problems that are solved using the Microsoft CRM Marketing Automation module

Chapter 4: Planning Marketing Campaigns

This chapter explains the concepts for planning a marketing campaign and how to gather information in Microsoft CRM system to assist in the preparation of marketing campaign

Main Topics
<ul style="list-style-type: none">▪ Marketing Campaigns▪ Planning a campaign▪ Managing Lists▪ Using Lists
Labs
<ul style="list-style-type: none">▪ Create a List▪ Send email to a list

After completing this chapter, students should be able to:

- Identify the process for planning marketing campaigns
- Recognize the tasks involved and information required prior to creating a marketing campaign
- Manage and create lists used in marketing campaigns
- Use a list for marketing purposes to send information to potential customers

Chapter 5: Campaign Creation

This chapter closely examines the process for creating a campaign and a campaign template. Also discussed is the process and importance of testing a campaign prior to launching.

Main Topics
<ul style="list-style-type: none"> ▪ Creating a Campaign ▪ Managing and Testing Pre-Launch Campaigns
Labs
<ul style="list-style-type: none"> ▪ Create a Campaign ▪ Campaign Tasks and Activities

After completing this chapter, students should be able to:

- Create a new campaign
- Create a campaign template
- Create tasks and activities associated with a campaign

Chapter 6: Campaign Execution and Response Management

This chapter discusses the process for running a campaign and keeping track of campaign activities. The lesson also explores the analysis of data that results from marketing campaigns.

Main Topics
<ul style="list-style-type: none"> ▪ Executing a campaign ▪ Running and Managing Campaigns ▪ Tracking Marketing Information ▪ Quick Campaigns
Labs
<ul style="list-style-type: none"> ▪ Launch a campaign ▪ Manage a campaign ▪ Marketing analysis ▪ Quick campaigns

After completing this chapter, students should be able to:

- Launch a marketing campaign
- Manage the various aspects of a campaign
- Analyze results of a marketing campaign
- Create a Quick Campaign