Marketing Automation Workshop

Course Description

Making the most of marketing automation requires using the right tools to successfully attract and keep customers, aligning marketing and sales processes, priming the sales pipeline with new leads, and gauging the effectiveness of your efforts in real-time. In this one-day course, you work in a provided NetSuite account while studying how to set up Marketing Automation features and preferences. You also perform day-to-day tasks for creating and managing a multi-channel campaign.

A case study provides the context for instructor demonstrations and student exercises, showing you how to design email templates, create online lead generating forms, import leads, identify opportunities with Upsell Manager, use workflows to support lead nurturing and more.

Attendees are provided with:

- A training account populated with data in which to do their hands-on exercises, simulating the real-world experience of completing marketing tasks.

- Student workbooks that include reading topics and hands-on exercises.

Key Tasks
How do I:

- Configure NetSuite for Marketing Automation?
- Design email templates and send scheduled email blasts?
- Create online lead generating forms?
- Segment customers into target groups?
- Mine NetSuite data to identify opportunities?
- Schedule and launch multi-channel campaigns?
- Create and track keyword campaigns?

Who Should Attend

- Administrators who are responsible for setting up and maintaining NetSuite Marketing Automation.

- Marketing personnel who need to create and manage marketing campaigns in NetSuite.

Prerequisites

Course participants should be comfortable using NetSuite navigation, working with forms and lists, and other common tasks. Take the Getting Started training videos available in SuiteAnswers to learn NetSuite basics.

Course Objective

The goal of this course is to introduce the features and functions of NetSuite Marketing Automation, walking you through the three phases of creating and managing multi-channel campaigns: Framing Campaign Automation, Building Campaign Components and Launching Campaigns.

Upon completing this course, you should be familiar with the capabilities of NetSuite Marketing Automation and confident that you can set up and perform day-to-day marketing operations successfully.

Agenda

Framing Campaign Automation

- Perform Initial Setup: Enable Marketing Automation features, enable promotion codes, set up email addresses and manage campaign subscription categories.

Related Course
Take this course for more training:

- SuiteAnalytics: Reports and Searches

- Complete Setup Tasks: Set up campaign email domains, define email preferences and examine DKIM, define promotion codes, and create promotional URLs.

- Define Marketing Preferences and Campaign Management: Define marketing preferences and set up campaign categories.

Building Campaign Components

- Design Marketing Communications: Create HTML and text email templates, add images to the email templates, define best practices for using email templates, and examine how to use letter templates.

- Work Leads and Opportunities: Create online forms to capture new leads, import lead records into NetSuite and use Upsell Manager to mine your NetSuite data to identify opportunities.

- Target Marketing Groups: Create static groups from lists, create dynamic groups from saved searches, define best practices for creating groups and examine other uses for groups.

Launching Campaigns

- Create and Manage Campaigns: Create campaign records and schedule events, and create, export and import keyword campaigns.

- Incorporate Lead Nurturing: Examine the steps for setting up a lead-nurturing workflow for automating drip-marketing email campaigns.

- Training On-Demand Appendix: Monitor campaigns and measure success, manage the campaign calendar, use mass update to manage campaign and marketing information, use standard marketing reports, identify the purpose of each report, and set up the Home Dashboard with marketing metrics and key information.

SuiteAnswers
Get answers to your support and training related questions:

- Go to Videos to find Getting Started tutorials.

- View New Feature Previews to learn about the latest NetSuite release.