## **Suite**Training<sup>™</sup>

# **Marketing Automation Workshop: Energizing Sales**

### **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?

## **RELATED COURSES**

#### Take these courses for more training:

- NetSuite Essentials
- Ecommerce Workshop
- SuiteFlow
- SuiteAnalytics

### **Course Description**

Making the most of marketing automation means using the right tools to successfully attract and keep customers; align marketing and sales processes; prime the sales pipeline with new leads; and gauge the effectiveness of your efforts in real time.

In this comprehensive one-day workshop, 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 context and hands-on exercises to simulate real-world tasks, 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.

### **Who Should Attend**

- Administrators who are responsible for setting up and maintaining NetSuite Marketing Automation.
- Marketing managers and power users who need to create and manage marketing campaigns in NetSuite.

### Requirements

- Course participants should be familiar with NetSuite navigation and common tasks:
  - Take the **Getting Started** training videos available in SuiteAnswers to learn NetSuite basics.

## **Course Objectives and Topics**

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 a multichannel campaign: 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.

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#### **SUITEANSWERS**

### Get answers to your support and training questions:

- · Go to the Learning Center to find related self-paced training videos
- Take New Feature Training to learn about the latest NetSuite release

### LIVE TRAINING WEBINARS

### Participate in monthly, free Webinars to get practical tips and tricks for using NetSuite better:

• Go to www.netsuite.com to register for an event: Services > SuiteTraining > Training Webinar Series

### **Agenda**

### Framing Campaign Automation

- Perform Initial Setup: Enable Marketing Automation features; enable promotion codes; set up email addresses; manage campaign subscription categories.
- Complete Setup Tasks: Set up campaign email domains; define email preferences and examine DKIM; define promotion codes; create promotional URLs.
- Define Marketing Preferences and Campaign Management: Define marketing preferences; 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; examine how to use letter templates.
- Work Leads and Opportunities: Create online forms to capture new leads; import lead records into NetSuite; 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; examine other uses for groups.

### Launching Campaigns

- Create and Manage Campaigns: Create campaign records and schedule events; create, export and import keyword campaigns.
- Incorporate Lead Nurturing: Associate a lead-nurturing workflow to a drip-marketing campaign event, automating marketing email campaigns.
- Self-Study 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; set up the Home Dashboard with marketing metrics and key information.

NetSuite reserves the right to adjust the stated course content to reflect changes to the NetSuite application and to meet the expressed needs of course attendees.

Features and functions covered in this course might not reflect those in your purchased NetSuite account.