

# 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?

## 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.

## 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.

## Related Courses

- Take these courses for more training:
  - NetSuite Essentials
  - SuiteAnalytics: Reports and Searches

## SuiteAnswers

Get answers to your support and training related questions:

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

## Course Objectives

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.

### Framing Campaign Automation

**Perform Initial Set Up:** Enable Marketing Automation features; enable promotion codes; set up email addresses; manage campaign subscription categories.

**Complete Set Up 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.

## Live Training Webinars

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

- Go to [suitetraining.com](http://suitetraining.com) > Webinars and Events to view the schedule and register for an event.

## Launching Campaigns

**Create and Manage Campaigns:** Create campaign records and schedule events; 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.

**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.