CHAPTER 1: INTRODUCTION

Objectives

The objectives are:

- Examine the benefits of closed loop marketing.
- Create and use marketing lists.
- Identify when to use a quick campaign and when to use 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.

Introduction

Microsoft Dynamics® CRM provides the tools to make it easier for your marketing staff to take advantage of the customer data you already have. They can join efforts with sales and more easily evaluate the success of marketing efforts. Overall, Microsoft Dynamics CRM enables you to extend the effectiveness of your marketing department. Using marketing campaigns, marketing lists, and campaign templates, marketing employees can identify, execute, and replicate effective marketing initiatives across sales channels.

Benefits of Closed Loop Marketing

In many organizations, there is division between what happens in the Marketing department and what happens in the Sales department. This division can cause one or more of the following problems:

- The sales team has no visibility into what marketing is doing to support their efforts.
- The marketing team has no visibility into what the sales team does to follow up on the leads they produce.
- Overall marketing effectiveness does not improve because there is no way to measure what works and what does not.

Microsoft Dynamics CRM is designed to help companies solve these problems by providing one tool to connect the efforts of both groups.

In Microsoft Dynamics CRM, marketing campaigns can be used to provide what is known as "closed loop marketing." By ensuring that the campaign targets, campaign activities, and the results of the campaign activities are related and captured in a consistent format, the entire team can measure data such as:

- Number of leads produced
- Number of converted leads
- Number of opportunities
- Revenue produced from closed opportunities
- Cost for each lead
- Cost for each opportunity

The ability to know what was spent on a campaign and relate it to the actual revenue that resulted is the essence of closed loop marketing. A marketer with this information can plan, forecast, and target more effectively. Additionally, this information helps the marketing team assess the quality of lead sources and design campaigns that produce better results with each effort.

Creating and Using Marketing Lists

A marketing list is a list of accounts, contacts, or leads that share common characteristics. For example, a marketing list can be a list of all the contacts that live in a certain area, or all the leads that have registered on a web form.

Marketing lists are created independently of a marketing campaign. Each marketing campaign must have at least one marketing list, because the list designates the recipients of the communications generated by the campaign activities.

Creating Marketing Lists

When creating a marketing list in Dynamics CRM, the most important properties to specify are as follows:

- The **Member Type** for the marketing list is the type of record from which the members are drawn: accounts, contacts, or leads. Once you have saved a marketing list, the member type cannot be changed. Also, you can only add members of the specified type to a single list.

- Use the **Type** field to specify whether the list will be **Static** or **Dynamic**. Static lists will need to have their members updated periodically; the members of dynamic lists will be automatically updated based on the query specifying which members are included in the list. Once a marketing list is created, you cannot change the value specified in the **Type** field.

The method of adding members to your marketing list differs depending on whether you have created a static or dynamic marketing list.

Adding Members to a Static Marketing List

Regardless of what happens to the underlying accounts, contacts or leads data, the members of a static marketing list will not change unless you use the Manage Members function to update the list's members. Suppose you created a static marketing list containing contacts in a specific city to target for a marketing event in that city, and that you specified that only contacts opted in for email marketing are included in the list. Over time, several things can happen to the underlying contact information:

- New contacts in that city may be added.

- Contacts in that city may be deactivated or deleted.

- Contacts included in the marketing list may change their "opt-in" status for marketing emails.

Since the marketing list is static, none of those changes will impact the list members until you use the **Manage Members** function to update the list.

*NOTE: In this example, the fact that the list is static means that there may be contact records within its member list that have opted out for email marketing since the list was last updated. It is important to realize that the Dynamics CRM email marketing function will **not** send a marketing email to a list member who has been opted out by setting the value of the **Bulk E-mail** field to **Do Not Allow**. But if you want the members within a marketing list to reflect the purpose of the list, and one of the purposes of a list is to send emails to willing recipients, it is a good practice to use the **Manage Members** function to periodically update static marketing lists.*

Procedure: Create a Static Marketing List Using Lookup to Add Members

Use the following procedure to create a marketing list using lookup to add members:

1. On the site map, click **Marketing** and then click **Marketing Lists**.
2. On the **Marketing Lists** tab, in the **Records** group, click **New**.
3. In the Name field, enter a concise, descriptive name for the list.
4. In the **Member Type field**, select the type of record from which the members will be drawn: **Account**, **Contact**, or **Lead**.
5. In the **Type** field, select **Static**.
6. On the **Marketing List** tab, in the **Save** group, click **Save**.
7. In the left navigation area of the **Marketing List** form, in the **Common** section, click **Marketing List Members**.
8. On the **List Tools Marketing List Members** tab, in the **Actions** section, click **Manage Members**.
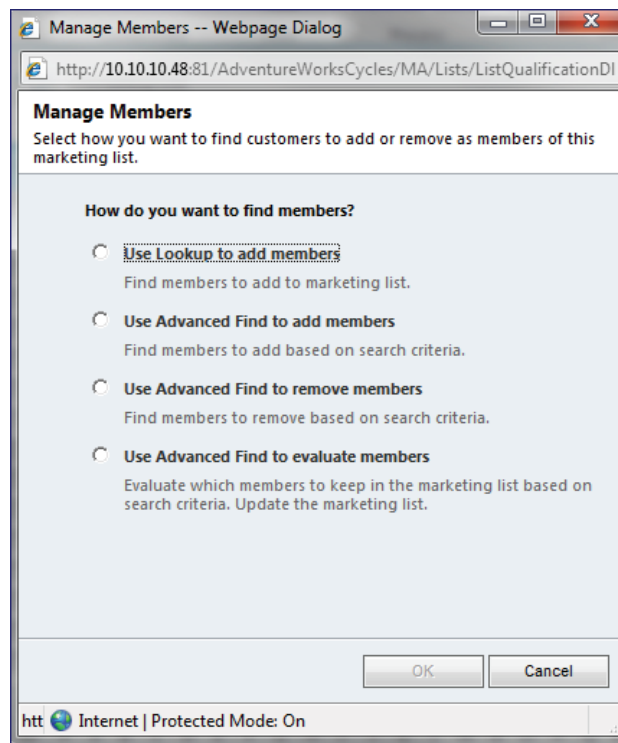

FIGURE 1.1 MANAGE MEMBERS DIALOG

9. In the **Manage Members** dialog box, click **Use Lookup to add members**, and then click **OK**.
10. In the **Look Up Records** dialog, use the **Search** field to narrow your member list.

11. Select the members, and then click **Add** to move them to the **Selected records** box. Click **OK**.
12. Click the **File** tab, and then click **Close**.

Procedure: View the Members of a Marketing List

Use the following procedure to view the members of a marketing list:

1. On the site map, click **Marketing** and then click **Marketing Lists**.
2. Select the appropriate **Marketing List** from the list.
3. In the left navigation area of the **Marketing List** form, in the **Common** section, click **Marketing List Members**.

Updating Static Marketing Lists

After a static marketing list is created, it may need to be updated. For example, you may want to remove members that have not purchased in the last six months or members that have opted out of receiving marketing email.

You can add or remove members to or from the list at any time, but they must be of the member type you selected for the list; accounts, contacts, or leads. You can add accounts, contacts, and leads to an existing marketing list in multiple ways:

- Use the same procedure you used to create the marketing list.
- When you are in a list of accounts, contacts, or leads, select the record to add. Then on the **More Actions** menu, select **Add to Marketing List**. Select the marketing list to which the record must be added. Only the marketing lists for that record type appear.
- If you are in a record, from the **Actions** menu, select **Add to Marketing List.** Then, select the marketing list to which the record must be added. Only the marketing lists for that record type appear.
- Use **Advanced Find** to select accounts, contacts, or leads that fit the criteria specified. From the **More Actions** menu, select **Add to Marketing List.** Then, select the marketing list to which the record must be added. Only the marketing lists for that record type appear.

Procedure: Adding and Managing Members of a Dynamic Marketing List

Use the following steps to add members to a dynamic marketing list:

1. In the site map, click **Marketing**, and then click **Marketing Lists**.
2. Locate a dynamic marketing list, and double-click it to open its form.

3. In the marketing list form, on the **Marketing List** tab, in the **Actions** group, click **Manage Members**. The **Manage Members** dialog opens. This is a special-purpose Advanced Find view, with the marketing list's **Member Type** pre-selected in the **Look for** drop-down list.
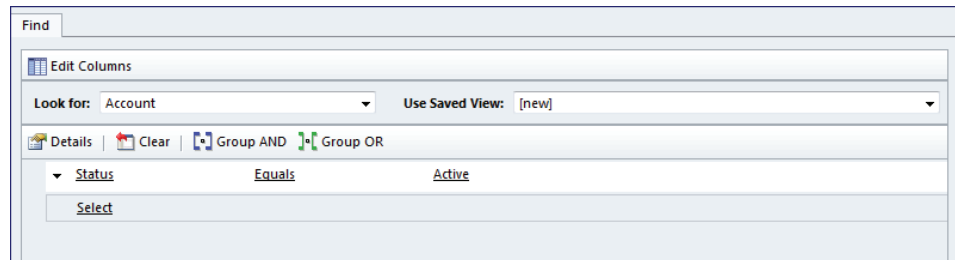

FIGURE 1.2 MANAGING MEMBERS OF A DYNAMIC MARKETING LIST

4. Use the Advanced Find view to identify the members to include in the marketing list. Click **Find** to preview the members.
5. Click **Back to Query** to make any required changes to the query.
6. When you are finished adding members, click the **Use Query** button. This updates the members and closes the **Manage Members** dialog.

NOTE: Unlike a static marketing list, a dynamic list's members are automatically updated as the underlying data are changed. This way, when you manage members for a dynamic marketing list, you will only need to update the list when making changes to the query that selects the list's members.

Procedure: Add a Marketing List to a Campaign

Use the following procedure to add a marketing list to a campaign:

1. On the site map, click **Marketing** and then click **Campaigns**.
2. Select the appropriate **Campaign** from the list.
3. In the left navigation area of the **Campaign** form, in the **Marketing** section, click **Target Marketing List**.
4. On the **List Tools Marketing Lists** tab, in the **Records** group, click **Add Existing Marketing List**.
5. In the Look Up Records dialog, use the **Search** field to narrow your marketing list.
6. Select the marketing list, and then click **Add** to move them to the **Selected records** box. Click **OK**.
7. In the **Add Marketing List to Campaign** dialog, select the box to add the lists to open undistributed campaign activities. The list is then automatically added to all campaign activities.
8. Click the **File** tab, and then click **Close**.

Marketing Campaigns and Quick Campaigns

Both marketing campaigns and quick campaigns can be run using Microsoft Dynamics CRM. Marketing campaigns represent marketing efforts over a period of time, while quick campaigns represent an instant marketing effort. Both types of campaigns allow you to do the following:

- Create **activities**, which are the interactions with the customer, such as an email, a letter, or a phone call.
- Use **marketing lists**, which are lists of customers that meet specific criteria, such as all customers who have bought a specific product in the last year.
- View **campaign responses**, which are the customer replies to campaign activities.

Marketing Campaigns and Quick Campaigns

Marketing campaigns are used for traditional marketing efforts where the user may want to schedule multiple activities, such as an email broadcast followed by targeted phone calls. Marketing campaigns also allow you to add target products, sales literature, and related campaign details to the campaign. Marketing representatives and marketing managers generally use this feature.

Marketers use a wizard to create quick campaigns to use for single-activity campaigns. These are shorter term efforts that distribute only one activity. For instance, if a sales representative knows that he or she will be attending a tradeshow in a certain geographic area, he or she can use Advanced Find to quickly create a list of leads in that area. The sales representative can then use the list to create a quick campaign and schedule a phone call for each lead. Each scheduled phone call automatically shows up in the Workplace as an activity. Salespeople or sales managers often use quick campaigns.

Comparing Marketing Campaigns and Quick Campaigns

Marketing campaigns and quick campaigns have similar functionalities: both can use marketing lists, provide distribution information through activities, and enable you to view the responses. However the following are some important differences:

Marketing Campaigns	Quick Campaigns
Can distribute multiple activities	Can distribute one activity only
Several built-in reports for analysis	No built-in reports
Can save campaigns as templates and create from templates	Cannot save as or create from templates
Can track financial information and measure ROI	No financial information or ROI

Marketing Campaigns	Quick Campaigns
Can create planning activities	Cannot create planning activities
Can associate target products and price lists	Cannot associate target products or price lists

Quick Campaigns

Quick campaigns create a single activity for distribution to a marketing list or a unique group of accounts, contacts, or leads. The Quick Campaign Wizard simplifies the task of choosing an activity, assigning the activity to the appropriate user(s), filling in the details of the quick campaign, and distributing the activities. The scheduled activity appears automatically in the assigned user's Workplace. Create quick campaigns by first creating a list of the recipients for the campaign and then starting the Quick Campaign Wizard.

To create a quick campaign, start by identifying the customers that the campaign is targeting. Do this by selecting customers from a view, or by creating a search in which the results are the target customers. From the search result, start the Quick Campaign wizard.

Quick campaigns allow activities to be assigned to users and queues for completion.

Planning Your Quick Campaign

Before starting the Quick Campaign Wizard, determine the following:

- **The activity for this quick campaign**. The activity determines the channel through which customer communications are delivered. The activities available are Phone Call, Appointment, Letter, Fax, and E-mail. Only one type of activity can be selected for the quick campaign, and only one instance of that activity can be distributed per customer.
- **The owner of the activities**. Who will own (perform) the activities. The choices are:
  - **Me**. The currently signed in user.
  - **The owner of the records included in the quick campaign**. For example, if you manage a sales team and the quick campaign is aimed at accounts owned by sales representatives on your team, you can choose to have the activities assigned to the sales representatives who own the accounts.
  - **Assign to another user or team**. Microsoft Dynamics CRM activity records can be assigned either to a user or a team. If you assign records to a team, consider also placing them into a shared queue where team members can accept responsibility for them as part of a formal follow-up process.

- **Whether to automatically send the email and close the activity once the email is sent**. This only applies if the activity type for the campaign is email.
- **The details for the quick campaign's activity**. The details vary by activity. Note that if the activity type is an E-mail, you can select an E-Mail template to use, generating personalized emails as the campaign activities.

Selecting Customers for a Quick Campaign

There are three ways to select customers for a Quick Campaign:

- Select the contacts, accounts, or leads directly from a view, such as My Active Leads. In the list, select the desired records, and then click **Create Quick Campaign** to start the wizard. You can launch the campaign for all selected records on the page or all records on all pages. The image shows an example of this approach.
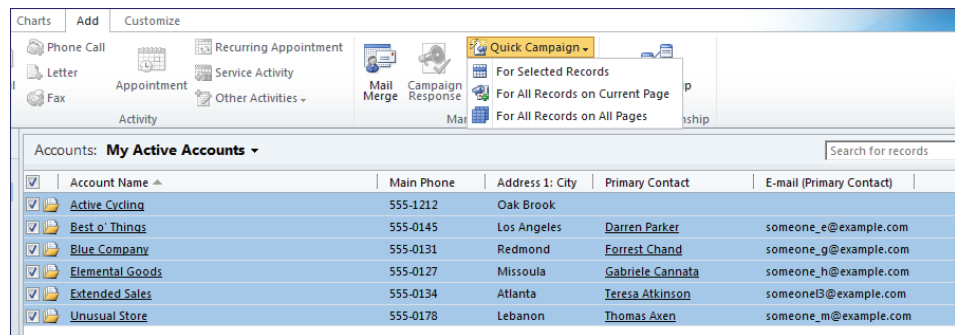

FIGURE 1.3 SELECTING ACCOUNTS FOR A QUICK CAMPAIGN

- Use a marketing list to select the customers. To access existing marketing lists, in the Navigation Pane, click **Marketing** and then click **Marketing Lists**. Select the list to use, and then click **Create Quick Campaign** to start the wizard.
- Use Advanced Find to search records. After running an Advanced Find, in the results, click **Create Quick Campaign** to start the wizard.

Working with a Quick Campaign

When creating a new quick campaign, you can choose who owns the activities that are distributed. The activity, such as the phone call, is then completed by the owner specified. You can assign the activities to:

- **Yourself**: This allows you to quickly make a list of customers to personally work with.

- **The owner of the records**: This allows you to assign work to the specific owner of the customer record.
- **Another user or a queue**: This allows you to assign the work to a queue for anyone to work on.

After you create the quick campaign, Microsoft Dynamics CRM creates and distributes the activities to the selected accounts, contacts or leads. Once the quick campaign has been created and distributed, the assigned user can view and take action on the campaign activities and the responses. The records for customers can be viewed and reports can be run to analyze the effectiveness of the campaign.

Procedure: Create a Quick Campaign

Use the following procedure to create a quick campaign in Microsoft Dynamics CRM:

1. On the site map, click **Sales** and then click **Leads**, **Accounts**, or **Contacts**, depending on the type of record associated with the quick campaign activity.
2. Select the records for which you want to create a quick campaign.
3. Click the **Create Related** tab, and then click **Quick Campaign**. Select one of three options from the drop-down list:
   a. **For Selected Records**: Select this option if you have selected one or more records on the list page.
   b. **For All Records on Current Page**: Select this option to include all records on the page for the quick campaign activity.
   c. **For All Records on All Pages**: Select this option to include all records on all pages for the quick campaign activity.

4. On the **Create Quick Campaign Wizard** dialog click **Next**.
5. In the **Name** field, enter the campaign name, and click **Next**.
6. In the **Activity Type field**, click the type of activity this campaign will create. The choices are:
   a. **Phone Call**
   b. **Appointment**
   c. **Letter**
   d. **Fax**
   e. **E-mail**: To automatically send the email message when you finish the wizard, select **Send email messages automatically and close corresponding email activities**.

7. In the **Assign these activities to** field, click the appropriate owner option. The choices are:

    a. **Me**: The activities will be assigned to you.

    b. **The owners of the records that are included in the quick campaign**: The activities will be assigned to the owners of each record.

    c. **Assign to another user or team**

8. Optionally, select the **Add the created activities to a queue** option to place the activities in a queue. Click **Next**.

9. Depending on the selection in Step 6 above, the **Specify the Content of the Activity** form will contain various fields to be completed. Enter the appropriate information and click **Next**.

10. Confirm the quick campaign information and click **Create**. The quick campaign activities are immediately distributed as indicated.

Lab 1.1 - Quick Campaigns

During this lab, you will create a Quick Campaign for all active accounts.

Scenario

The marketing manager has customized the "Account Reconnect" e-mail template and wants to send a copy of it to every active account.

Goal Description

Use the Quick Campaign feature to send an e-mail to all active accounts, using the "Account Reconnect" e-mail template and assigning all activities to the Sales team for follow-up.

Challenge Yourself!

Perform the following steps to complete this lab:

1. Click **Quick Campaign** in the Actions group.
2. Select **For Selected Records**.
3. Follow the steps in the Wizard to complete the campaign.

Need a Little Help?

Perform the following steps to complete this lab:

1. In the **Navigation Pane**, select **Marketing** and then **Active Accounts**.
2. Click **Create Quick Campaign** in the Actions group.
3. Select **For Selected Records**.
4. Follow the steps in the Wizard to complete the campaign.

Step by Step

Perform the following steps to complete this lab:

1. In the site map, click **Marketing**. Then click the right-arrow to the right of **Accounts** and select **Active Accounts** from the drop-down list.
2. Select all records in the view by clicking the check-box at the top of the data grid.
3. Click the **Add** tab, and then click **Quick Campaign** in the **Marketing** group.
4. Select **For Selected Records**.
5. After the **Create Quick Campaign Wizard** opens, click **Next**.
6. In the **Name** box, type "**Account Reconnect"** and then click **Next**.
7. In the **Activity Type** box, select **E-mail**.

8. Select the **Assign to another user or team** option, and then click the Lookup button to the right of the field.

9. Select **Team** in the **Look for** drop-down list, and then select the Sales team. Click **OK**.

10. Click **Next**.

11. Click the **Use Template** checkbox, and then click the **Select Template** button at the right of the field.

12. In the **Select Template** dialog, select the **Account Reconnect** template and then click **OK**. Notice that the **Subject** and **E-mail** body fields are read-only. This is because the e-mail template already contains that information.

13. Click **Next** and then click **Create**.

14. In left navigation, click **Quick Campaigns**.

15. Open the **Quick Campaign** you just created by clicking **Account Reconnect** in the **My Quick Campaigns** list, and then click **E-mail Messages Created**, and review the list of letters that were generated.

Introduction to Marketing Campaigns

In Microsoft Dynamics CRM, the marketing campaign represents a complete marketing effort. Marketing campaigns organize all the details in one place, including:

- Planning activities
- Campaign activities
- Target Products
- Sales literature
- Related campaigns
- Target Marketing Lists
- Distribution of campaign activities

By having all the information in one place, you can quickly assess how successful the campaign was.

Campaign Activities

Campaign activities form the core of a campaign; they are the action that constitutes the campaign, such as sending a letter, making a phone call or sending an email. Campaign activities can include a priority and a budget. For example, if the activity is a letter, the budget might include the cost of printing, envelopes, and postage. This information helps you determine the cost and value of the campaign. When finished with the activity, you can update the actual cost. Tracking the costs assists in planning future activities and campaigns.

Campaigns can have more than one activity, for example, you might send a letter and follow up with a phone call. Activities within a campaign can use the same marketing list or each activity can use a different list. For example, a campaign might include three different marketing lists for various groups of customers with different messaging for each group. In this case, you will create separate activities for each message and each activity uses a different marketing list to target the appropriate customers for that message.

The types of campaign activities in Microsoft Dynamics CRM are as follows

- Phone
- Appointment
- Letter
- Mail Merge
- Fax
- E-mail

While creating or modifying campaign activities, you can enter the costs of the activities. When costs are updated in activities, they automatically update the

total cost of the overall campaign. This allows you to view all costs associated with a campaign.

Distributing Campaign Activities

Once you have created your campaign activities and it is time to launch the campaign, you will then *distribute* the activities. You can create campaign activities early in the campaign planning cycle and then use planning activities as a reminder of when it is time to distribute them.

Once a campaign activity has been distributed, the activity owners can view the activity records in the **Activities** section in the **Workplace** and follow up appropriately**.**
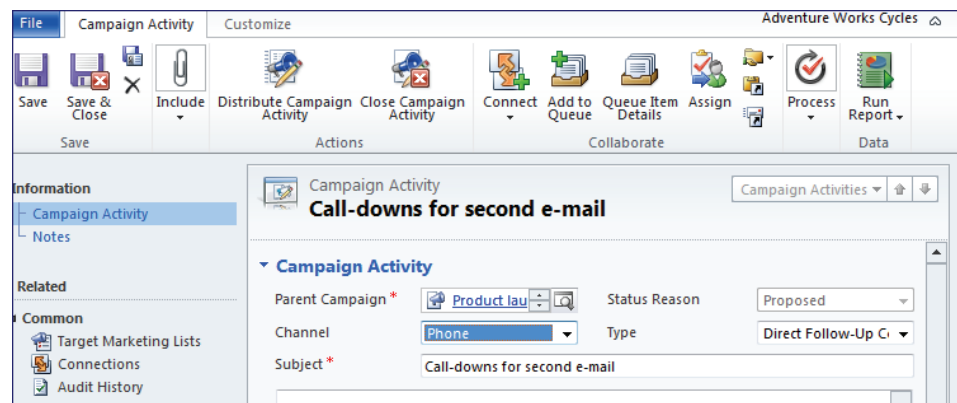

FIGURE 1.4 DISTRIBUTING CAMPAIGN ACTIVITIES

Target Marketing Lists

Simply stated, marketing lists are lists of accounts, contacts, or leads that match a specific set of criteria. Marketing lists can only contain one record type, such as contacts, accounts, or leads. After determining the record type, it cannot be changed.

Additionally, you can delete, deactivate, or merge marketing lists into other lists. Static marketing lists can be "locked" by selecting the **Yes** option in the **Locked** field. When this option is selected, members cannot be added to or removed from the list.
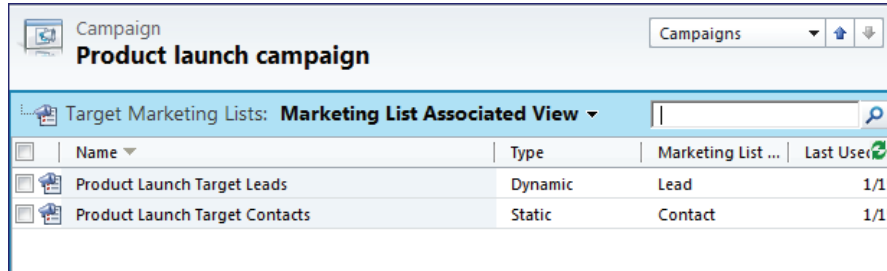

FIGURE 1.5 ADDING MARKETING LISTS TO A CAMPAIGN

Planning Activities

Planning activities help you organize all of the activities required to launch and operate a campaign. For example, if your campaign were an event for your customers, you could enter planning tasks such as reserving space or hiring vendors. You can also have tasks such as designing and ordering the brochures to be mailed out.

Target Products

A marketing campaign can be designed to promote one or more products. If your organization uses the product catalog in Microsoft Dynamics CRM, you can add products to the campaign to make it simple for salespeople to view what the campaign is promoting, and to help create specific reports showing campaign effectiveness. For example, the marketing team might be interested in knowing how many campaigns were run to promote a certain product over a certain period and how much revenue those campaigns generated.
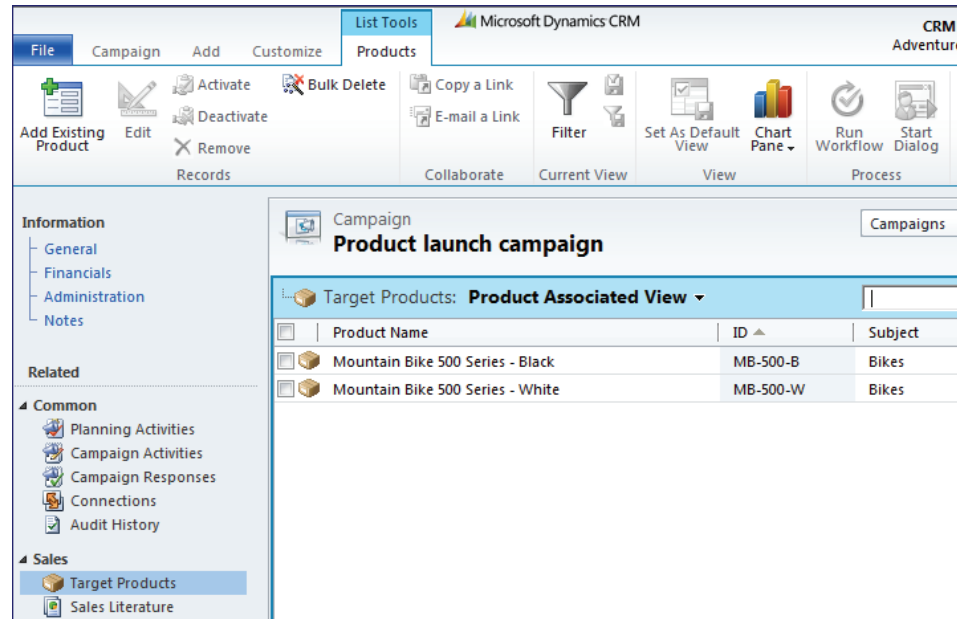

FIGURE 1.6 TARGET PRODUCTS FOR A MARKETING CAMPAIGN

Sales Literature

Sales literature is content about a product or a service. Salespeople can review the literature and deliver it to customers based on their interest level. Marketers can add sales literature files to a campaign to help salespeople find the information needed for effective customer follow-up. Sales representatives can download or view added sales literature whenever it is needed.

Adding Related Campaigns

Microsoft Dynamics CRM allows you to add related campaigns to each other so you can compare the effectiveness of each separate campaign or look at all the campaigns together. For example, to run several small campaigns promoting a certain product over the course of a year, you can add the smaller campaigns to an overall campaign. Once the campaigns are completed, you can run reports to analyze the effectiveness of the overall campaign and of each of the related campaigns.

Using Marketing Campaign Templates

Campaign templates allow you to plan a campaign and then reuse it for any number of marketing campaigns. You can add many campaign-related items to a template and then use that template to create multiple campaigns. This reduces the amount of time and planning required to create campaigns.

Templates can also help to ensure that multiple campaigns driven by different staff members contain the same activities, product information, or other items you want to remain consistent.

You can modify or publish campaign templates for use by any number of Microsoft Dynamics CRM users. For example, if you are part of a centralized marketing team that provides support to staff located in other regions or countries, you can create a template and make it available to all Marketing and Sales Representatives. They can then create new campaigns from the template and modify it to suit local needs and launch unique, targeted campaigns to accounts in their geographic area.

Creating a Marketing Campaign

Marketing campaigns are used for more complex marketing efforts where the user may want to schedule multiple activities, such as an email broadcast followed by targeted phone calls. They are longer term efforts and usually distribute information through several different types of activities.

The campaign is the container for all the information, tasks, and activities you need to manage the campaign. To "launch" a campaign, distribute activities to the assigned users. These activities make up the core of the campaign. The activity specifies the channel that you will use to communicate with the customer and, once the activity is performed, constitutes the actual customer communication.

Perform the following steps to create a marketing campaign:

1. **Create the campaign record** (required).
2. **Enter the planning tasks**: the tasks necessary to "launch" the campaign.
3. **Define the campaign activities** (required): the communications that will take place, through which channel, and performed by whom.
4. **Select a marketing list** (required): the users to whom the communications will be sent.
5. **Specify targeted products:** the products advertised by this campaign.
6. **Specify sales literature:** any literature that might be useful or used by the people performing the activities.

Tracking Campaign Costs

The **Financials** tab on the campaign contains budget and actual cost information. The individual campaign activities also contain cost information. Generally, the campaign manager enters and updates the following information.

In the campaign record:

- **Budget Allocated**: The amount of money budgeted for the campaign.
- **Miscellaneous Costs**: Any costs not incurred by campaign activities.
- **Estimated Revenue**: The expected revenue resulting from this campaign.

In the campaign activity records:

- **Budget Allocated**: The amount of money budgeted for this activity. (Note that activity budget allocation is not rolled up into the campaign's budget allocation. The numbers are maintained separately.)
- **Actual Cost**: The actual cost of the activity when it is performed.

When you save the relevant records, Microsoft Dynamics CRM calculates and displays the following information in the **Financial** tab of the campaign record:

- **Total Cost of Campaign Activities:** The actual cost of the campaign, based on the actual costs entered for all the campaign's activities.
- **Total Cost of Campaign:** The actual cost of the campaign, based on the costs entered for all the campaign's activities plus the miscellaneous costs entered for the campaign.

Procedure: Create or Edit a Campaign

Use the following procedure to create or edit a campaign:

1. On the site map, click **Marketing** and then click **Campaigns**.
2. On the **Campaigns** tab, in the **Records** group, click **New**.

FIGURE 1.7 CREATING A NEW CAMPAIGN RECORD

3. In the **General** section of the form, enter the appropriate information and observe any noted restrictions or requirements as needed. The most important fields include:
   a. **Name**: This is a required field.
   b. **Currency**: If you intend to associate a price list with the campaign you must select the same currency that is specified in the price list.
   c. **Status Reason**: Click on the stage that the campaign is in the drop-down.
   d. **Campaign Type**: Select the campaign type in the drop-down.
   e. **Price List**: If you select a price list, any opportunities arising from this campaign will automatically get the same price list.
   f. **Offer**: Enter a description of the actual offer you are contacting customers about.
   g. **Proposed Begin Date, Proposed End Date**
   h. **Actual Begin Date, Actual End Date**

4. In the **Financials** section of the form, enter the appropriate information and observe any noted restrictions or requirements as needed:

   a. **Budget Allocated**

   b. **Expected Revenue**

   c. **Miscellaneous Costs**: Enter the total for any known costs of the campaign that are not entered in the actual campaign activity records.

5. In the **Notes** section of the form, enter any information that might be helpful to users who will view this campaign.

6. On the **Campaign** tab, in the **Save** group, click **Save & Close**.

Planning Activities

After you have created the campaign record, you can add planning activities to it. Planning activities are actions that are generally performed **prior** to distributing the campaign activities; they are the pieces that must be put in place for the campaign. Typical planning activities include the following examples:

- Booking event venue and catering information for an event marketing campaign

- Writing advertising or website copy, or creating landing pages

- Creating any marketing collateral required for the campaign

- Appointments or phone calls to discuss various campaign-related issues

- Purchasing lists or other items from outside vendors

NOTE: In Microsoft Dynamics CRM 2011 a planning activity can be any type of activity record, such as a phone call, an e-mail, an appointment and so forth. This is different from previous versions, in which a "planning task" was a special version of a task activity type that could only be used in a campaign. This new approach is a significant improvement, since it preserves the ability to associate an activity with a campaign, to report on it and so forth, but adds complete flexibility in the kinds of activities you can use to plan campaigns.

Procedure: Create a Planning Activity

Use the following procedure to create a planning activity:

1. On the site map, click **Marketing** and then click **Campaigns**.

2. Select the appropriate **Campaign** in the list.

3. In the left navigation area of the **Campaign** form, in the **Common** section, click **Planning Activity**.

4. On the **List Tools Activities** tab, in the **Records** group, click **Add New Activity**.

5. Select **Task** from the drop-down list of the available activities.

6. In the **Task** section of the form, enter the appropriate information and observe any noted restrictions or requirements as needed.

7. In the **Notes** section of the form, enter any appropriate information.

8. On the **Task** tab, in the **Save** group, click **Save & Close**.

9. Click the **File** tab, and then click **Close**.

Campaign Activities

Campaign Activities are in most cases the "customer touch-points" of a campaign. For example, you can use an email campaign activity to send emails to every member of a marketing list, or a phone call campaign activity can assign phone call activities to the sales representatives responsible for the contacts in a list.

Campaign activities fall into two categories:

- **Channel activities**: The activity specifies a channel of communication (such as an email, a letter, or a phone call). Channel activities can be *distributed*. When a campaign activity is distributed an activity record of the same kind as the channel is created. For example, when an email campaign activity is distributed, individual emails can be sent to each of the members in a marketing list, and appear as if they are sent from the users responsible for each contact record. When a phone call campaign activity is distributed, phone call activities will be created and can be assigned to the responsible account manager.

- **Non-channel activities**: Activities that do not have a specified channel or that have a channel of **Other** cannot be distributed; they act as to-dos to track actions that must be performed during the campaign. All campaign activities, including non-channel activities, remain in the owner's activity list until they are changed to channel activities, completed, and then closed.

An activity can have a particular marketing list associated with it. For example, a campaign might have three different marketing lists for various groups of customers, to send different messaging to each group. A channel campaign activity cannot be distributed unless at least one marketing list is associated with it.

Procedure: Add an Activity to a Campaign

Use the following procedure to add an activity to a campaign:

1. On the site map, click **Marketing** and then click **Campaigns**.

2. Click on the appropriate **Campaign** in the list.

3. In the left navigation area of the **Campaign** form, in the **Common** section, click **Campaign Activity**.

4. On the **List Tools Campaign Activities** tab, in the **Records** group, click **Add New Campaign Activity**.

FIGURE 1.8 CREATING A NEW CAMPAIGN ACTIVITY

5. In the **Campaign Activity** section of the form, enter the appropriate information and observe any noted restrictions or requirements as needed.

6. On the **Campaign Activity** tab, in the **Save** group, click **Save & Close**.

7. Click the **File** tab, and then click **Close**.

View Campaign Activities

After adding activities, you can view the activities for a campaign from within the campaign record.

1. In the Navigation Pane, click **Marketing** and then click **Campaigns**.

2. In the list, select and open the campaign.

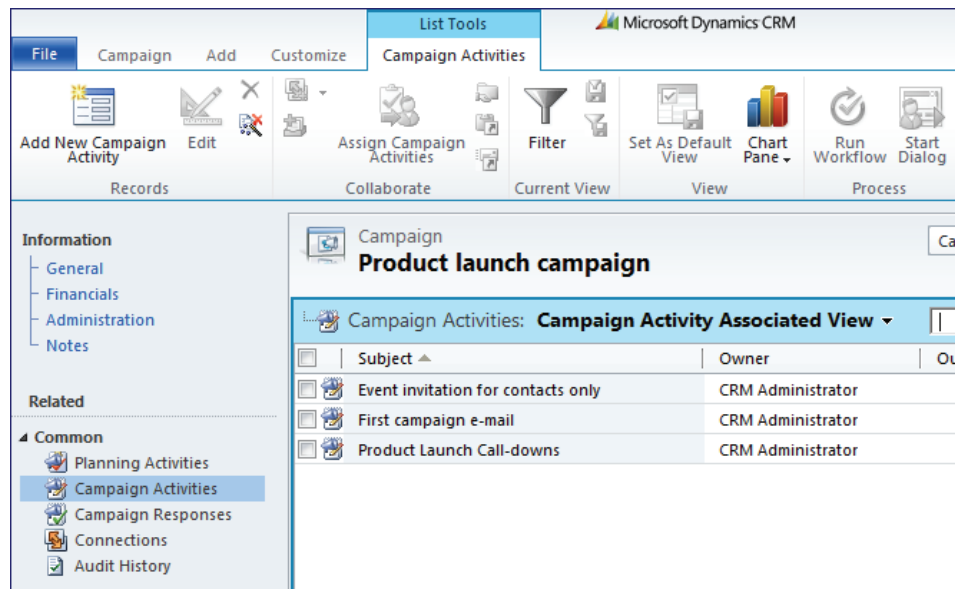3. In the form's navigation pane, under **Details,** click **Campaign Activities.**

FIGURE 1.9 VIEWING CAMPAIGN ACTIVITIES

The list of campaign activities appears, including:

- The subject of the activity, such as purchase list from vendor. This information provides a brief description of what work has to be completed.

- The person responsible for completing the activity.

- The vendor that has been selected to perform the task. This information only appears if you have linked the vendor record to the activity. A vendor can be either an account or a contact.

- The method of conducting the activity. For example, this might be a phone call if your sales staff contact customers by phone, or e-mail if you plan to send electronic messages.

- The status of the activity. This can be proposed, completed, canceled, or closed.

Procedure: Add a Marketing List to a Campaign

Marketing campaigns often take place over the course of several weeks or months. As a campaign progresses, you can add new marketing lists to the campaign at any time. If marketing lists are added to a campaign that has undistributed campaign activities, you have the option of adding those lists to those campaign activities.

Perform the following steps to add marketing lists to an existing campaign:

1. In the site map, click **Marketing** and then click **Campaigns**.
2. Locate the campaign in the list and click it to open the form.
3. In the left navigation area of the **Campaign** form, in the **Marketing** section, click **Target Marketing Lists**.
4. On the **List Tools Marketing Lists** tab, in the **Records** group, click **Add Existing Marketing List**.
5. In the **Look Up Records** dialog, select one or more lists and click **Add**.
6. Then click **OK** to add them to the campaign.
7. In the **Add Marketing Lists to Campaign** dialog, accept the default value for the **Add the marketing lists to open undistributed campaign activities** field and click **OK**.

Lab 1.2 - Create a Marketing Campaign

During this lab, you will create a new marketing campaign. As you perform the instructions, use the information in the Scenario and Goal Description to complete the lab.

Scenario

The Marketing Manager is in charge of planning the company's annual marketing event. This year's event is a Customer Appreciation Golf Tournament for all new customers. The marketing manager must reserve a golf course to host the event and e-mail the invitations a month prior to the event. The event is for July 1, 2011.

The Marketing Manager needs to create a campaign for the golf tournament and create activities so that emails are sent to all of the players in the tournament.

Goal Description

Create a new marketing campaign enter the following information for the marketing campaign:

- **Name**: Customer Appreciation Golf Tournament
- **Status Reason**: Ready to Launch
- **Campaign Code**: CAGT
- **Campaign Type**: Event
- **Expected Response**: 40
- **Budget Allocated**: $25,000 USD
- **Miscellaneous Costs**: $2,500 USD

The campaign will include the following activities:

- Planning activity: **Reserve Country Club**
  - o **Owner**: Administrator
  - o **Priority**: Normal
  - o **Due**: May 1, 2011

- Subject: **Invitation E-Mail**
  - o **Owner**: Gail Erickson
  - o **Channel**: E-mail
  - o **Type**: Direct Initial Contact
  - o **Priority**: High
  - o **Scheduled Start Date**: February 15, 2011

The campaign will use the marketing list, "Active Accounts".

Challenge Yourself!

Using the information provided in the Goal Description, perform the following steps to complete this lab:

1. Create the campaign and enter the information on the campaign form.
2. Create the planning activities.
3. Create the campaign activities.
4. Add the marketing list to the campaign.

Need a Little Help?

Step 1 - Create a campaign

1. Navigate to **Marketing** and then **Campaigns**.
2. Create a new campaign.
3. In the Campaign form, enter the information found in the Goal Description.
4. Save the campaign.

Step 2 - Create the planning activities

1. In the form's navigation pane, click **Planning Activities**.
2. Create a new task.
3. In the Task form, enter the information found in the Goal Description for the planning activity.

Step 3 - Create the campaign activities

1. In the form's navigation pane, click **Campaign Activities**.
2. Create a new activity.
3. In the Activity form, enter the information found in the Goal Description for the campaign activity.
4. After clicking Save and Close following the last activity, save the campaign.

Step 4 - Select the marketing list

1. In the form's navigation pane, click **Target Marketing Lists**.
2. Add an existing marketing list and select the "Active Accounts" list.
3. Save the campaign.

Step by Step

Perform the following steps to create the campaign, the planning and campaign activities, and add the marketing list:

1. On the site map, click **Marketing** and then click **Campaigns**.
2. On the **Campaigns** tab, in the **Records** group, click **New**.
3. In the **General** section of the form:
   a. **Name**: type "Customer Appreciation Golf Tournament"
   b. **Status Reason**: select **Ready to Launch**
   c. **Campaign Code**: type "CAGT"
   d. **Campaign Type**: select **Event**
   e. **Expected Response**: type "40"

4. In the **Financials** section of the form:
   a. **Budget Allocated**: type "25000"
   b. **Miscellaneous Costs**: type "2500"

5. On the **Campaign** tab, in the **Save** group, click **Save**.
6. In the left navigation area of the **Campaign** form, in the **Common** section, click **Planning Activities**.
7. On the **List Tools Activities** tab, in the **Records** group, click **Add New Activity**.
8. On the drop-down list of the available activities, click **Task**.
9. In the **Task** section of the form:
   a. **Subject**: type "Reserve Country Club", and then click **Save & Close**.

10. In the left navigation area of the **Campaign** form, in the **Common** section, click **Campaign Activities**.
11. On the **List Tools Campaign Activities** tab, in the **Records** group, click **Add New Campaign Activity**.
12. In the **Campaign Activity** section:
    a. **Channel**: select E-mail
    b. **Type**: select Direct Initial Contact
    c. **Subject**: type "Invitation E-Mail"
    d. **Scheduled Start**: type 2/15/2011

13. On the **Campaign Activity** tab, in the **Save** group, click **Save & Close**.

14. In left navigation, in the **Marketing** section, click **Target Marketing Lists**.

15. Click **Add Existing Marketing List**.

16. Select the **Active Accounts** list and click **OK**.

17. In the **Add Marketing Lists to Campaign** dialog, accept the default values and click **OK**.

18. Click **Campaign**.

19. Click **Save & Close**.

Creating and Using Campaign Templates

Often, you will conduct a campaign similar to one you have previously done. For example, every tradeshow requires similar preparation and activities. Creating a campaign template allows you to plan a campaign and add campaign-related items, then save the template for use in the future, for similar marketing campaigns. Users can create a new campaign from a template and then modify it to meet the specific needs of the new campaign. Using templates can reduce the amount of data entry and planning time required for a campaign.

You can add the following campaign-related items to a campaign template:

- Marketing activities
- Products
- Sales literature
- Marketing lists
- Budget information

Procedure: Create a Campaign Template

Use the following procedure to create a campaign template:

1. On the site map, click **Marketing** and then click **Campaigns**.
2. On the **Campaigns** tab, in the **Records** group, click **New Template**.
3. Complete the necessary fields.
4. On the **Campaign** tab, in the **Save** group, click **Save & Close**.

Procedure: Create a Template from an Existing Campaign

Use the following procedure to create a template from an existing campaign:

1. On the site map, click **Marketing** and then click **Campaigns**.
2. Select the appropriate **Campaign** in the list.
3. On the **Campaign** tab, in the **Actions** group, click **Copy as Template**.
4. The campaign template opens in a new Campaign form. Enter a name for the template. It is a good idea to include the word "Template" in the name.
5. On the **Campaign** tab, in the **Save** group, click **Save & Close**.

Procedure: Create a New Campaign from a Template

Use the following procedure to create a new campaign from a template:

1. On the site map, click **Marketing** and then click **Campaigns**.
2. Select the appropriate **Campaign** in the list.

3. On the **Campaign** tab, in the **Actions** group, click **Copy as Campaign**.
4. Enter a name for the new campaign.
5. On the **Campaign** tab, in the **Save** group, click **Save & Close**.

Importing Leads

Marketing departments are often responsible for building and maintaining an organization's leads. Often, lead records need to be imported from external sources. Microsoft Dynamics CRM features an easy to use **Import Data Wizard** that automates the process of importing lead records and many other types of information, such as accounts, contacts and products.

The **Import Data Wizard** allows you to import data from several different file formats, including .xml, .txt. and .zip files. One of the most commonly used formats for importing data is the .csv format, which is one of the "save as" options in Microsoft Office Excel, and which can be opened, viewed and edited using Excel.

Using the Import Data Wizard

The Import Data Wizard uses the following process to import lead records from an external file:

1. Verify the data file you wish to import is in one of the supported file formats.
2. Start the wizard, and browse to the file containing the leads to import.
3. Select the "data map". This is a file that specifies how the columns in the file to be imported correspond to, or "map" to fields in Microsoft Dynamics CRM. In most cases, you do not need to worry about creating a separate data map file, and can use "Automatic Mapping".
4. Select the record type to import.
5. Specify how the columns in the import file correspond ("map") to Microsoft Dynamics CRM fields.

NOTE: The Import Data Wizard will automatically map fields for you if the label at the top of the column in the import file exactly matches (including case) with the name of the field in Microsoft Dynamics CRM. You can save time during the import process, if, before performing the import, you spend a few minutes reviewing your import file, and change the column headers to exactly match the corresponding CRM field name.

Procedure: Import Leads Using the Import Data Wizard

Marketing departments are often responsible for importing lead records into Microsoft Dynamics CRM. The Data Import Wizard can be used to import records such as leads.

Perform the following steps to import a file of leads stored in the frequently used .csv file format.

1. In the site map, click **Marketing**, and then click **Leads**.
2. On the **Leads** tab, in the **Data** group, click **Import Data**.
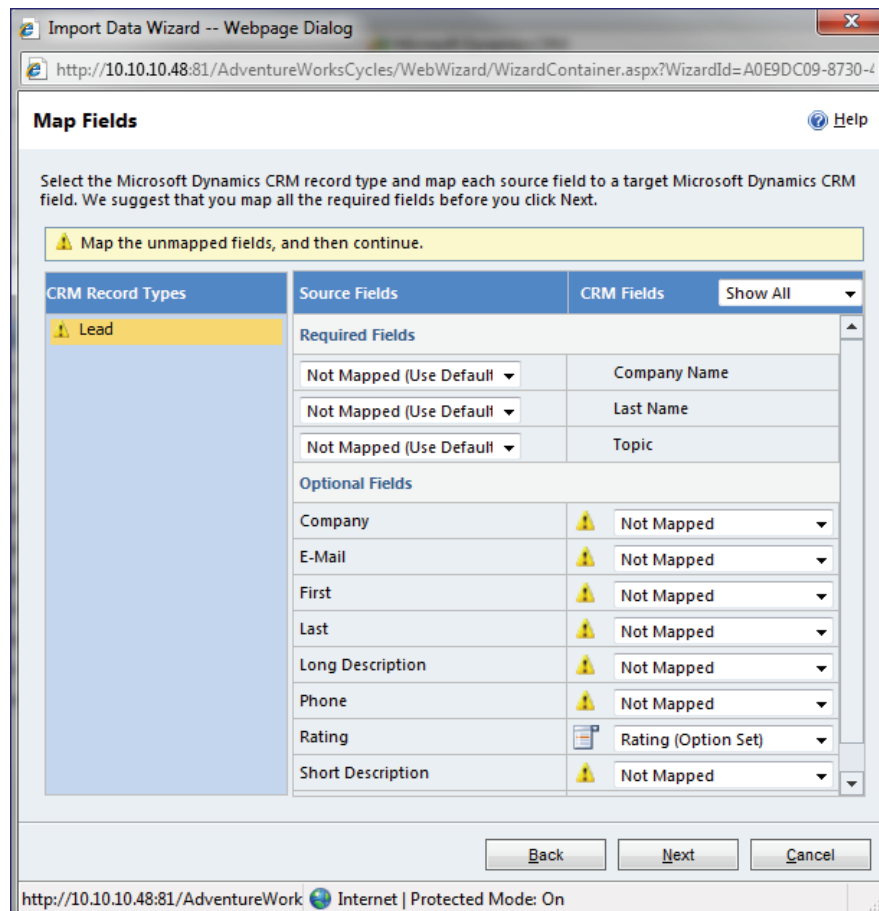

FIGURE 1.10 IMPORT DATA WIZARD

3. In the **Upload Data File** step of the Import Data Wizard, click the **Browse...** button, and locate and select the .csv file containing the leads you wish to import.
4. Click **Next**.
5. Click **Delimiter Settings** to expand the section, and confirm the delimiter settings. In this demonstration we will use the default values. Click **Next**.

6. In the **Select Data Map** step of the Import Data Wizard, select **Default (Automatic Mapping)**, and then click **Next**.
7. In the **Map Record Types** step, select the **Microsoft Dynamics CRM Record Types** drop-down list, and select **Lead**. Click **Next**.
8. Map the **Required Fields** and as many of the **Optional Fields** as you wish, and then click **Next**.
9. On the **View Mapping Summary Page**, verify that fields are mapped correctly, and then click **Next**.
10. Click **Submit**, and then click **Finish**.

Review Imported Lead Records

After you complete the Import Data Wizard, it may take a few minutes before the import is complete and the imported records are available. To examine the progress of the data import, follow these steps:

1. In the site map, click **Settings**, and then click **Data Management**.
2. On the **Data Management** page, click **Imports**.

Normally, the most recently submitted import job will appear at the top of the list. After a few minutes, the value of the Status Reason column will change to Completed. In this list you will see the number of records imported, and whether any errors were encountered during the import job.

After the import job is completed, you can follow these steps to examine the imported lead records:

1. In the site map, click **Marketing**, and then click **Leads**.
2. On the **Leads** tab, in the **Data** group, click **Filter**.
3. Click the drop-down arrow to the right of the **Created On** column header.
4. Click **Filter by Day**, and then click the **Today** check box.
5. Click **OK**.

The leads view will now be filtered to only display records created on the current date. If you do this immediately after importing records, it gives you a quick way of reviewing the records that were imported.

Summary

Microsoft Dynamics CRM enables you to develop sophisticated marketing campaigns that coordinate campaign activities, materials, and resources.

This lesson provides an overview of marketing campaigns, and demonstrates how your marketing staff might use closed-loop marketing to view customer preferences, relationships, and buying history to anticipate their future needs.

Microsoft Dynamics CRM provides the tools to makes it easy to launch simple, powerful campaigns allowing you to track responses and monitor results, saving time setting up future campaigns.

Test Your Knowledge

Test your knowledge with the following questions.

1. Which of the following is a benefit of closed loop marketing?

    ( ) Sales has visibility into what marketing is doing to support their efforts

    ( ) Marketing has visibility into what the sales team does to follow up on the leads they produce

    ( ) Overall marketing effectiveness improves because there is a way to measure what works and what does not

    ( ) All of the above

2. Which of the following is not a feature of quick campaigns?

    ( ) Associate a marketing list

    ( ) Create campaign activities

    ( ) Create multiple campaign activities

    ( ) Send e-mail to a marketing list

3. Which of the following are features of both Quick Campaigns and Marketing Campaigns?

    ( ) Can both use marketing lists

    ( ) Can both use campaign templates.

    ( ) Can distribute campaign activities to contacts, leads or accounts.

    ( ) Both have several built-in reports for tracking campaign effectiveness.

4. Which of the following cost-related functions can you perform in marketing campaigns?

    ( ) Forecast expenditures by month

    ( ) Budget the cost of activities

    ( ) View the total cost of the campaign

    ( ) Enter the actual cost of activities

5. Which type of records can you use to create a marketing list?

    ( ) Account

    ( ) Contact

    ( ) Lead

    ( ) Opportunity

6. Which of the following are true regarding marketing lists?

( ) Marketing list members can include leads, accounts, contacts and opportunities.

( ) Marketing list members can include leads, accounts, and contacts.

( ) Once a marketing list is saved, you cannot change the type of members that can be added to the list.

( ) All marketing lists are "static", and you must manually add or remove the members to reflect changes to the underlying data.

7. Which of the following can be associated with a marketing campaign?

( ) Campaign activities

( ) Marketing lists

( ) Leads

( ) Target products

8. From planning to executing a campaign, put the following steps in the best order:

Step:

_____: Define your organization's business objectives and goals for the campaign.

_____: Convert campaign responses to opportunities

_____: Create marketing lists for the campaign.

_____: Create and distribute campaign activities for the campaign.

9. Which of the following are types of campaign activities?

( ) Letters

( ) E-mails

( ) Planning Activities

( ) Phone Calls

10. Which of the following are required when you are creating a campaign record?

( ) Use a campaign template

( ) Set the start date

( ) Set the end date

( ) Name the campaign

11. Which of the following are required fields on the Campaign form?

( ) Name

( ) Currency

( ) Campaign Type

( ) Status Reason

12. Which is an advantage of using a campaign template?

( ) Templates are required for every campaign.

( ) Templates reduce the time of setting up the campaign.

( ) Templates are required when a product is involved in the campaign.

( ) Templates increase the campaign's response rate.

13. What are some of the items that can be associated with a campaign template?

( ) Campaign Activities

( ) Campaign Results

( ) Target Products

( ) Collateral

14. Which of the following are true regarding the data import wizard?

( ) A data map file must be created prior to running the data import wizard.

( ) Automatic mapping can often be used instead of creating an external data map.

( ) Column headers in the CSV file must match field names in Microsoft Dynamics CRM.

( ) If the column headers in the CSV file match field names in Microsoft Dynamics CRM the field mapping process is faster and easier.

Quick Interaction: Lessons Learned

Take a moment and write down three key points you have learned from this chapter

1. _____

    _____

    _____

2. _____

    _____

    _____

3. _____

    _____

    _____

Solutions

Test Your Knowledge

1. Which of the following is a benefit of closed loop marketing?

    ( ) Sales has visibility into what marketing is doing to support their efforts

    ( ) Marketing has visibility into what the sales team does to follow up on the leads they produce

    ( ) Overall marketing effectiveness improves because there is a way to measure what works and what does not

    (•) All of the above

2. Which of the following is not a feature of quick campaigns?

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    ( ) Create campaign activities

    (•) Create multiple campaign activities

    ( ) Send e-mail to a marketing list

3. Which of the following are features of both Quick Campaigns and Marketing Campaigns?

    (√) Can both use marketing lists

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    (√) Can distribute campaign activities to contacts, leads or accounts.

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4. Which of the following cost-related functions can you perform in marketing campaigns?

    ( ) Forecast expenditures by month

    (√) Budget the cost of activities

    (√) View the total cost of the campaign

    (√) Enter the actual cost of activities

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    (√) Contact

    (√) Lead

    ( ) Opportunity

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    ( ) All marketing lists are "static", and you must manually add or remove the members to reflect changes to the underlying data.

7. Which of the following can be associated with a marketing campaign?

    (√) Campaign activities

    (√) Marketing lists

    ( ) Leads

    (√) Target products

8. From planning to executing a campaign, put the following steps in the best order:

    Step:

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    ( ) Planning Activities

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    ( ) Use a campaign template

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    ( ) Set the end date

    (•) Name the campaign

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   (√) Name

   (√) Currency

   ( ) Campaign Type

   (√) Status Reason

12. Which is an advantage of using a campaign template?

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   ( ) Campaign Results

   (√) Target Products

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14. Which of the following are true regarding the data import wizard?

   ( ) A data map file must be created prior to running the data import wizard.

   (√) Automatic mapping can often be used instead of creating an external data map.

   ( ) Column headers in the CSV file must match field names in Microsoft Dynamics CRM.

   (√) If the column headers in the CSV file match field names in Microsoft Dynamics CRM the field mapping process is faster and easier.