

MARKETING CREATIO FUNCTIONALITY FOR END-USERS CORPORATE TRAINING

**Who should take this course:** This training program is meant for starting end-users of Creatio marketing, as well as clients and partners of Creatio who require a powerful and convenient tool to plan and conduct marketing campaigns and bulk emails, as well as lead generation and management.

**What to expect:** Participants will obtain a basic knowledge of the Creatio platform functionality, processes, and the marketing tools present in the marketing product. These include lead management (from qualification to need analysis and nurturing until the completion of a sale) for both B2C and B2B businesses. Classification, historical data and client data analysis will allow participants to build a 360 degree portrait of their client base. Participants will also learn about the marketing calendar and campaign systems, as well as the Creatio bulk email functionality and marketing events. Analytics and analysis for existing client bases will also be covered, as well as effective lead channel generation and the construction of advertising campaigns, bulk emails, and other marketing actions.

**Course duration & format:** The training takes place over 1 day with a total of 8 hour. In-person or online.

Time	Topic
30 mins	<b>Introduction to Creatio and terminology</b>
15 mins	<b>360 Client Portrait: Managing client data in the “Contacts” Section</b> <ul style="list-style-type: none"> <li>• Entering contact information into the system (field and field group setup)</li> <li>• Entering and storing connected data</li> </ul> <b>Special system actions for effective management of the contact base</b> <ul style="list-style-type: none"> <li>• Duplicate search and merging</li> </ul>
25 mins	<ul style="list-style-type: none"> <li>• Setup and synchronization with Google Contacts (overview)</li> <li>• Exchange contact synchronization (overview)</li> <li>• List setup for the section page</li> </ul> <b>Contact base segmentation and search and filtration options in the system</b> <ul style="list-style-type: none"> <li>• Filtration types: Quick, Standard, Advanced</li> <li>• Contact base segmentation with the help of preconfigured dynamic folders</li> <li>• Adding custom folders</li> </ul>
40 mins	<b>Contact base analytics</b> <ul style="list-style-type: none"> <li>• Adding aggregate columns to the section page</li> <li>• Exporting data from Creatio</li> </ul>
25 mins	<b>Public and private dashboard customization options</b> <b>360 Client Portrait: Managing company data – clients, contractors, competitors in the “Account” section</b> <ul style="list-style-type: none"> <li>• Entering account data into the system (field and field group setup)</li> <li>• Entering and storing connected data</li> </ul> <b>Bulk email functionality</b> <ul style="list-style-type: none"> <li>• Creatio marketing Integration and license management</li> <li>• Bulk email setup</li> <li>• Adding new bulk emails, template creation in the content designer</li> <li>• Preparing and adding an audience to a bulk email from the contact base</li> <li>• Parameter setup for mass emails and adding UTM tracking codes to track website activity</li> <li>• Bulk email analytics</li> </ul> <b>Working with trigger emails</b> <b>Split tests</b> <b>Preconfigured email analytics</b>
30 mins	<b>System implementation recommendations and advice on raising the quality of mass emails</b> <ul style="list-style-type: none"> <li>• Contact email address validation</li> <li>• Sending emails from your domain</li> <li>• How to avoid the spam folder</li> <li>• How to set up unsubscription links in your mass emails</li> <li>• Managing contact subscriptions for different mass email types</li> <li>• Bulk email restriction rule setup</li> <li>• Mass email integration for on-site users</li> </ul>
20 mins	<b>Event management</b> <ul style="list-style-type: none"> <li>• Planning and event creation, adding event teams and budgets</li> <li>• Adding a target audience and modifying event participant responses</li> <li>• Organizing team roles for preparing and holding events. Activity history</li> </ul> <b>Event analytics</b>
40 mins	

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Time	Topic
1 hour	Lunch
40 mins	<p><b>Lead Management</b></p> <ul style="list-style-type: none"> <li>• Ways to fill your lead database</li> <li>• Registration and data input for leads</li> <li>• Entering lead requirements</li> <li>• Managing lead sources and channels. Other lead characteristics</li> <li>• Lead stage management and understanding the out-of-the-bus “Lead management” business process</li> </ul> <p><b>Lead analytics summary</b></p>
40 mins	<p><b>Landing Pages</b></p> <p>Terminology and principles of working with landing pages in Creatio:</p> <ul style="list-style-type: none"> <li>• How to create a landing page on your site: general recommendations</li> <li>• How to set up lead generation from landing pages to Creatio and default lead field values</li> <li>• Examples of use</li> </ul>
1 hour	<p><b>Marketing Campaign management</b></p> <ul style="list-style-type: none"> <li>• Modeling communication chains and campaign auditoriums in the campaign designer</li> <li>• Modeling inbound and outbound campaigns</li> <li>• Starting a campaign and tracking campaign progress</li> <li>• Campaign analytics</li> </ul>
1 hour	<p><b>Managing communications and completing weekly tasks in the system</b></p> <ul style="list-style-type: none"> <li>• Planning tasks <ul style="list-style-type: none"> <li>– Synchronizing tasks and meetings with Google Calendar and MS Exchange</li> <li>– Statistics and analysis of task completion with the help of graphics and other indicators</li> </ul> </li> <li>• Email functionality</li> <li>• Telephony integration</li> <li>• Corporate social feed functionality (ESN)</li> </ul>
10 mins	<p><b>Knowledge base</b></p>
40 mins	<p><b>System Designer</b></p> <ul style="list-style-type: none"> <li>• Color and logo customization</li> <li>• Universal data import from Excel (importing/updating lead contact communication channels, filling lookups and other information)</li> <li>• Using the section wizard – adding new fields and sections</li> <li>• User administration and management</li> <li>• Using business processes</li> <li>• Setup and functionality of MS Word printable forms</li> </ul>