

# Create your first CRM marketing campaign

Start a marketing campaign and  
track responses in Microsoft  
Dynamics CRM 2013



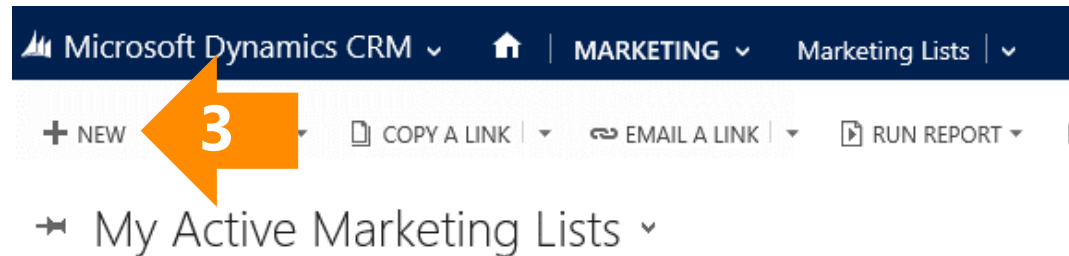
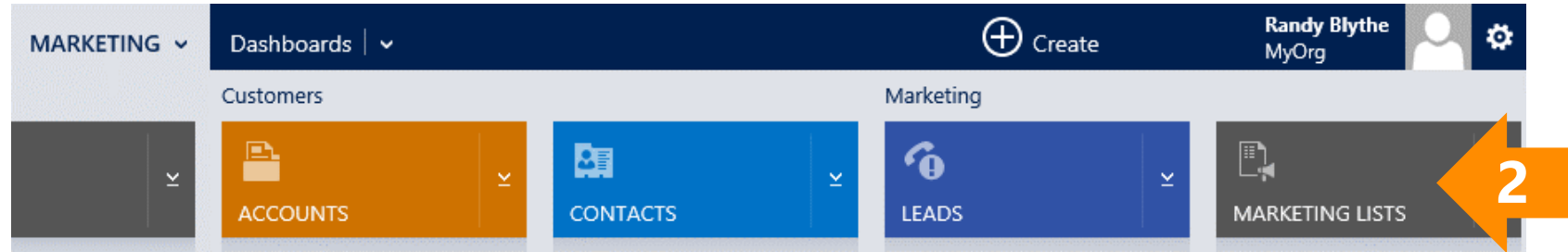
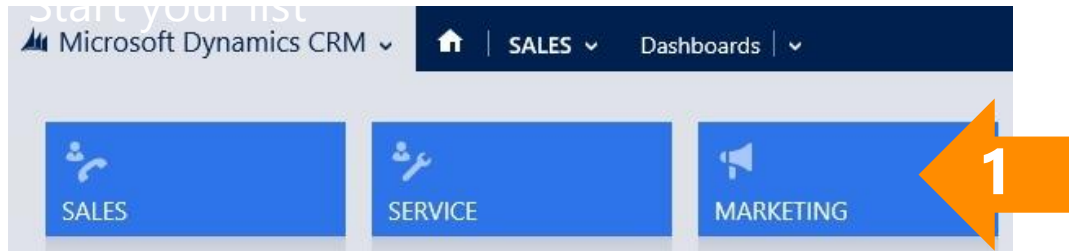
# get started with sales marketing in CRM

This quick walkthrough guides you through the steps of creating your first marketing campaign in Microsoft Dynamics CRM:

1. Create a marketing list
2. Add members to your marketing list
3. Create a campaign
4. Add your marketing list to your campaign
5. Add activities to your campaign
6. Distribute activities to your contacts and leads, and assign them to others on your team
7. Track your customers' responses
8. View marketing reports

# 1. Create a marketing list...

Target your campaign to specific customers. First, go to the marketing work area and start a new marketing list.



# ...add summary information and save it



SAVE **2** CLOSE + NEW FORM EDITOR

MARKETING LIST

## New Marketing List

### Summary

#### Information

Name \* Los Angeles Donors  
List Type \* Dynamic  
Purpose List for Los Angeles Full  
Targeted At \* Contact  
Source --  
Currency US Dollar  
Modified On --  
Cost --  
Last Used On --  
Locked No  
Owner \* Randy Blythe  
Description Notify Los Angeles donors of fund-raising event.

#### Members

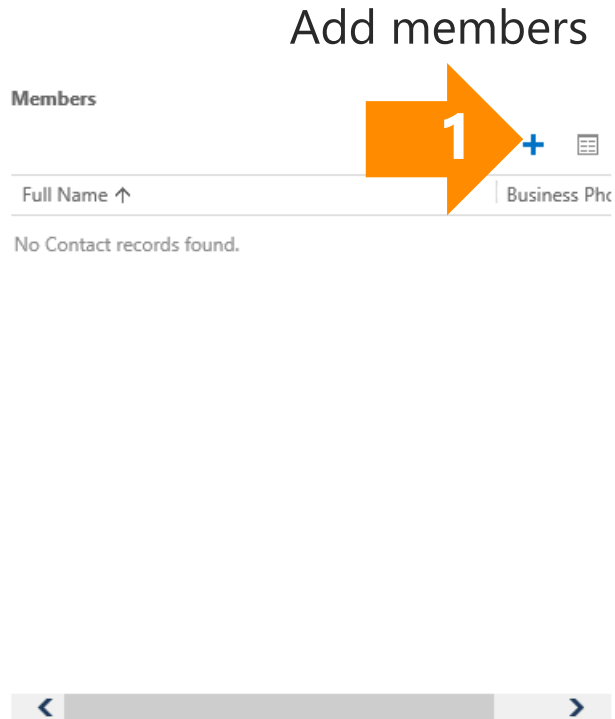
Select **Static** to enter manually, or **Dynamic** to use a query

Type in information for each field

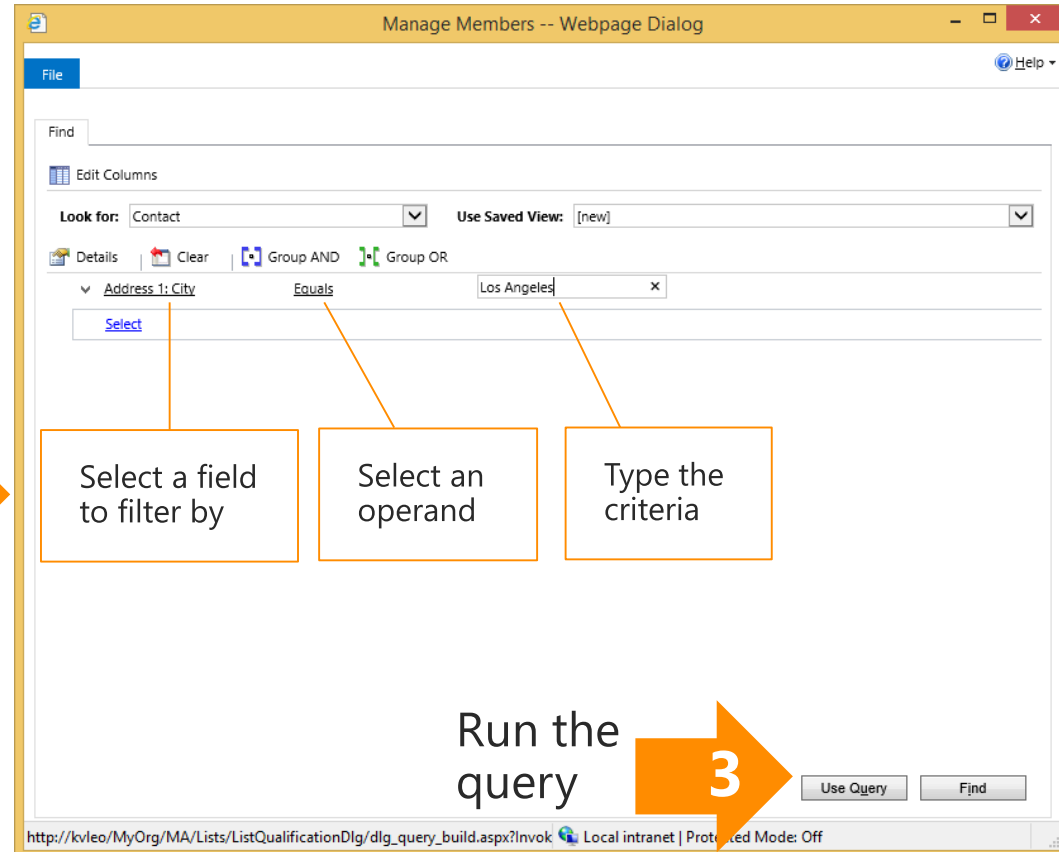


Save your list so you can add more information

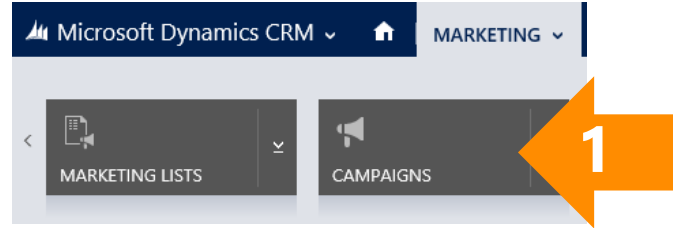
# 2. Add members to your marketing list



Edit your query



# 3. Create a campaign...



# ...add summary information and save it



Save your list so you can add more information

Type in information for each field



## CAMPAIGN New Campaign

### Summary

#### CAMPAIGN

Name \* Los Angeles Fund-Raiser  
Campaign Code LA20140519  
Currency \* US Dollar  
Campaign Type Event  
Expected Response<sup>Ⓔ</sup> 10

#### SCHEDULES

Proposed Start 4/1/2014  
Proposed End 5/15/2014  
Actual Start --  
Actual End --

### Details

#### FINANCIALS

Activity Cost	🔒 --	Allocated Budget	\$3,000.00
Misc. Cost	--	Total Cost	🔒 --

# 4. Add your marketing list to your campaign

**MARKETING LISTS**

Add a list

1

Name ↑ Members Count...

No Marketing List records found.

Select your list

**Look Up Records**

Enter your search criteria.

Look for Marketing List  Show Only My Records

Look in Marketing List Lookup View

Search Search for records

✓	Name	Type	Purpose	Marketing List
✓	Los Angeles Do...	Dynamic	List for Los Angeles Fund-...	Contact

1 - 1 of 1 (1 selected)

**Selected records:**

Los Angeles Donors

Select Remove

New Add Cancel

## Confirm Addition

Select where would you like to add this marketing list:

- To the campaign only.
- To the campaign and all undistributed campaign activities.

Add

Cancel



# 5. Add planning activities

**ACTIVITIES** NOTES

All ▾ | Add Phone Call Add Task ...

**1** Add tasks, phone calls, or other planning activities

Subject \* Determine campaign objectives

Description Enter description


Due 3/17/2014 [calendar icon] ▾ :00 AM ▾

Priority Normal

Owner \* [person icon] Randy Blythe

# ...and campaign activities

Add a campaign activity

**1** 




**CAMPAIGN ACTIVITIES**

Subject ↑	Channel
No Campaign Activity records found.	

Type in information for each field



Save your campaign activity



**3**   

CAMPAIGN ACTIVITY


## New Campaign Activity

### Campaign Activity

**SUMMARY**

Subject *	Write press releases
Used in Campaign *	<u>Los Angeles Fund-Raiser</u>
Type	Content Preparation
Channel	Other
Outsource Vendors	--
Description	Write press releases for submittal to papers and websites.
Scheduled Start	3/24/2014
Scheduled End	3/26/2014
Actual Start	 --
Actual End	 --

**FINANCIALS**

Currency	 <u>US Dolla</u>
Allocated Budget	\$100.00
Actual Cost	--

# 6. Distribute and assign campaign activities

**1** → DISTRIBUTE CAMPAIGN A...

CAMPAIGN ACTIVITY

Send email to Lc

New Emails

Fill out this form to create new emails for the members you selected in the marketing list. To add this email as a new email in each member's record, click Distribute.

Use Template

Header

From: <First name Last name>

Subject: Fund raiser May 19

Add information and then distribute

Help Distribute Cancel

Distribute Email Messages

Before you distribute the Email Messages, choose who you want to assign them to.

Email Messages Owner:

The owners of the records in the target marketing lists

Assign to Me

Assign to other user or team

Add to a queue

Choose whether you want to close the e-mail activities.

Close

Distribute Cancel

Assign the activity and distribute

# 7. Track your customers' responses

CAMPAIGN  
Los Angeles Fund-Raiser

Template  
No

Estimat  
\$0.00

## Details

### FINANCIALS

Activity Cost	\$0.00	Allocated Budget	\$3,000.00
Misc. Cost	\$0.00	Total Cost	\$0.00

### ADMINISTRATION

Owner	Randy Blythe	Created On	3/25/2014 2:20 PM
Modified By	Randy Blythe	Modified On	3/25/2014 2:20 PM

### RESPONSES

Subject ↑	Received On	Response Code...	Priority
-----------	-------------	------------------	----------

No Campaign Response records found.



Add a response

SAVE ← 2 Type in information and save

CAMPAIGN RESPONSE

## New Campaign Response

Related Campaign *	Response Code	Status *	Owner *
Los Angeles Fund-Raiser	Interested	Open	Randy Blythe

## Campaign Response

### SUMMARY

Subject \* Will attend

### RECEIVED FROM

Customer	--
Company Name	--
Last Name	Lyon
First Name	Robert
Phone	555-0106
Email	--

### DESCRIPTION

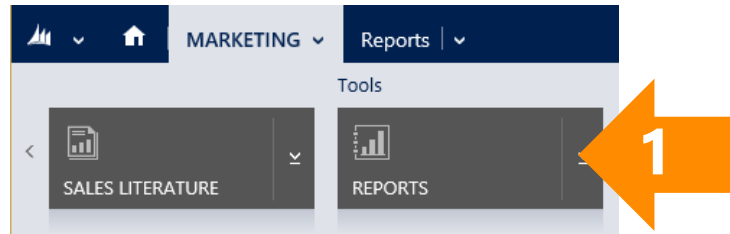
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### DETAILS

Promotion Code	--
Related Campaign *	Los Angeles Fund-Raiser
Response Code	Interested
Channel	Email
Outsourced Vendor	--
Owner *	Randy Blythe
Priority	Normal
Received On	3/25/2014
Close By	--

# 8. Choose a report...

During your campaign, continue updating costs, revenues, and responses to ensure your reports are up-to-date. Use the different marketing reports to assess your own results or to give your manager information about your campaign's return on investment (ROI).



## ➔ Available Reports ▾

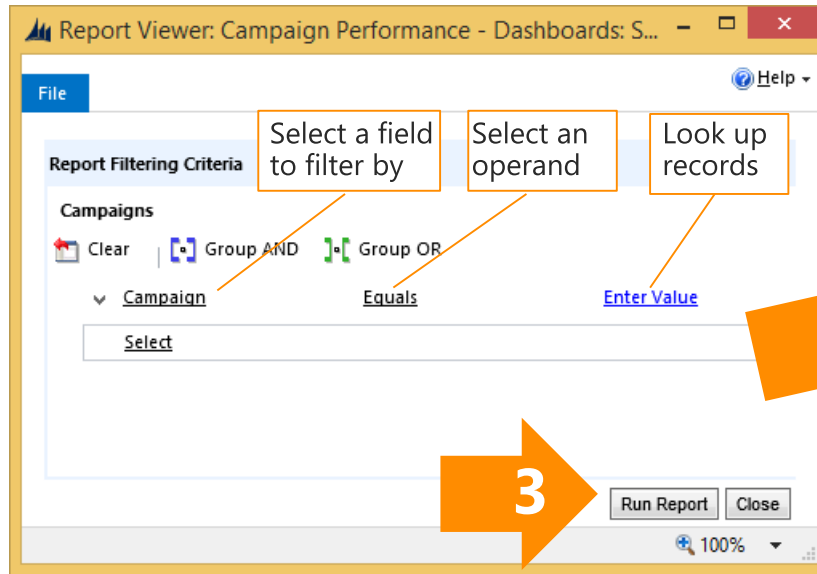
✓	Name ↑	Report Type
▶	Account Overview	Reporting Servic...
▶	Account Summary	Reporting Servic...
▶	Activities	Reporting Servic...
▶	Campaign Activity Status	Reporting Servic...
▶	Campaign Comparison	Reporting Servic...
✓▶	Campaign Performance	Reporting Servic...
▶	Case Summary Table	Reporting Servic...

Select the report  
you want

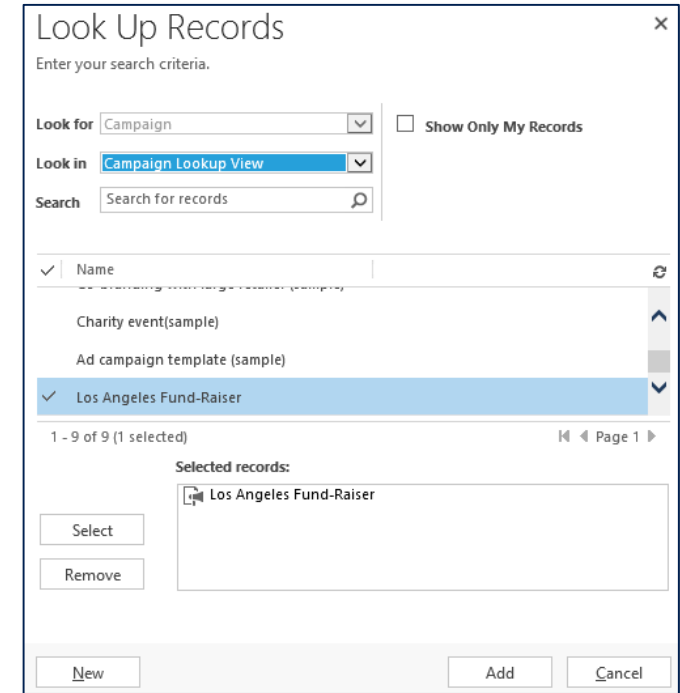


# ...set the report's lookup criteria...

Edit your query



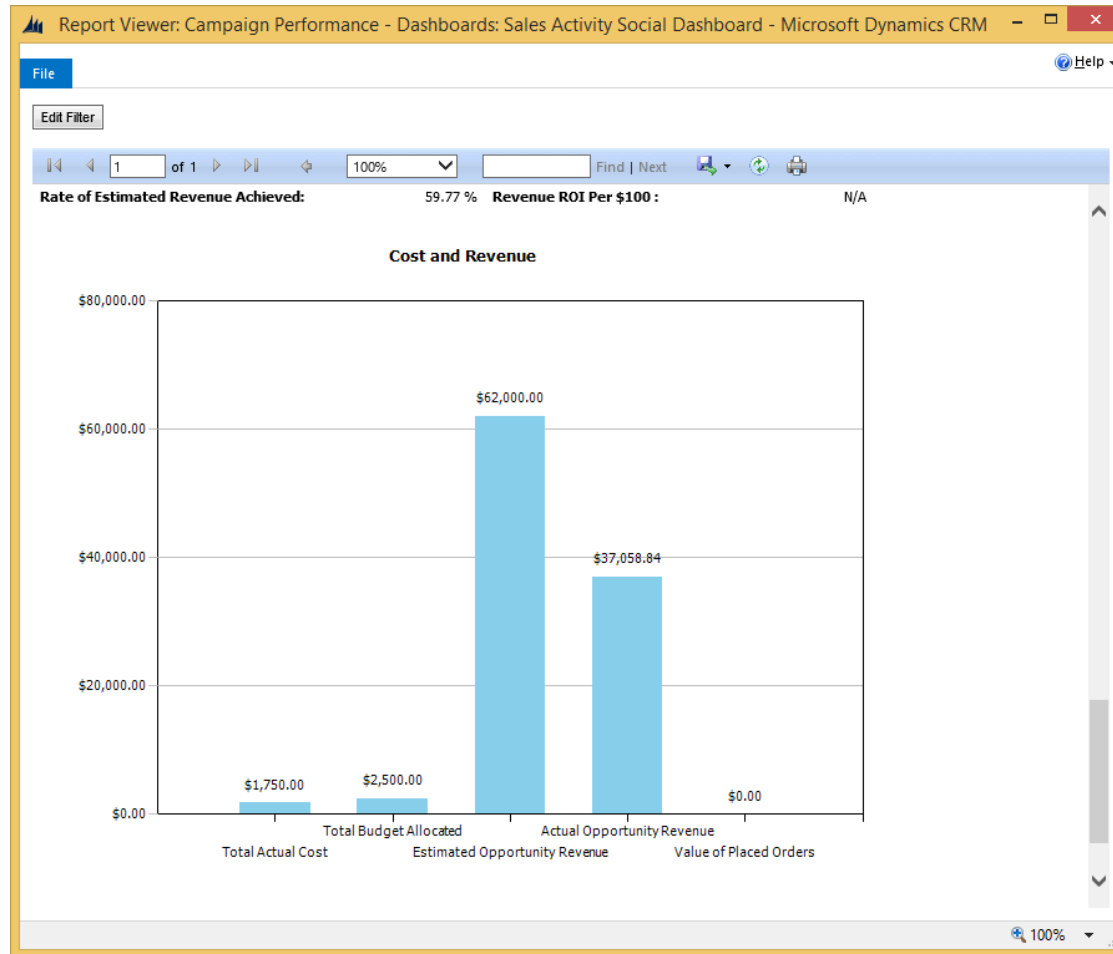
Select records to look up



Run the report



# ...and view the report



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Version 7.1.0





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