



## Marketing with Microsoft Dynamics CRM 2011

### Manage your data effectively

- Effortlessly import data from other sources into Microsoft Dynamics CRM.
- Use predefined data-mapping rules or create new ones on the fly.
- Confirm data import status with automatic e-mail notification.
- Intelligently cleanse your data to eliminate duplications and decrease your cost per engagement(CPE).

### Pinpoint your marketing efforts

- Use natural-language queries to instantly segment customers or prospects.
- Create highly targeted lists and associate them with campaigns.
- Set up personal or public views for reuse.
- Easily share target lists with colleagues and vendors.
- Export lists into multiple formats for bulk email or direct-mail communications.

### Streamline campaign planning

- Plan and track activities, tasks, budgets and details for each marketing activity.
- Set up product catalogues, price lists and discounts for optimal offers.
- Tailor messages and offers to highly targeted lists.
- Save time and money with reusable campaign templates.
- Use predefined workflows to streamline processes and approvals.
- Create Internet landing page for campaigns without any coding.
- Easily create marketing plans with embedded document management capabilities.

### Simplify campaign execution

- Initiate and distribute campaigns and communications instantly.
- Track and manage all event and customer details in one central platform.
- Use embedded Mail Merge capabilities to instantly send mass communications.
- Manually or automatically assign marketing tasks and leads.
- Create on-the-fly campaigns with the Quick Campaign Wizard.
- Create rules to trigger responses based on customer interest.

## Improve response management

- Centrally capture and track responses for marketing campaigns.
- Automatically capture and categorize responses from Internet landing pages.
- Score responses using predefined rules.
- Instantly assign responses to most qualified resources for follow-up.
- Instantly convert responses to leads.

## Streamline lead tracking

- Better coordinate with sales by tracking leads in one centralized system.
- Automatically assign or score leads based on predefined workflows.
- Instantly light up the most promising leads with conditional formatting.
- Use guided dialogs to streamline the lead qualification process.
- Ensure your marketing staff are working on the most current leads with bidirectional data synch with Excel.

## Extend value with Microsoft Office

- Use Microsoft Dynamics CRM within Microsoft Office Outlook for improved productivity.
- Instantly find the information you need with preview panes, personal views, record pinning and Most Recently Used lists.
- Eliminate redundant email tracking through Office Outlook synchronization.
- Better collaborate with co-workers with embedded presence feature.
- Streamline mass mailings with built-in mail-merge capabilities.
- Add Office Outlook contacts to marketing lists with a few mouse clicks.

## Automate workflows

- Boost productivity with personal, team, or organizational workflows.
- Dynamically assign tasks to the most appropriate resource using configurable rules.
- Accelerate approvals using predefined workflows.
- Automate followup with predefined triggers.
- Set alerts and reminders for campaign milestones.

## Mobile Express for Microsoft Dynamics CRM

- Access customer data from any web-enabled device anywhere, anytime.
- Track budgets and push through approvals while on the road.
- Create or update campaigns on the fly.

- Update, qualify or assign leads while on the road.
- Track key marketing metrics while on the road with rich offline reporting.

## **Gain key insights for decision making**

- Measure your marketing success with key performance indicators (KPIs).
- Gain business insight with flexible dashboards and inline data visualization.
- Follow key marketing objectives with comprehensive goal-tracking capabilities.
- Track key campaign indicators with built-in reports.
- Identify trends and allocate resources with powerful predictive analytics.
- Use robust data cubes for trending analysis.