

1100-eT: CDC MarketFirst Essentials

Overview

This online course, delivered over 5 days in daily three-hour sessions, teaches the fundamentals of the CDC MarketFirst product. In this introductory course, students learn how to plan and create a marketing campaign using the MarketFirst system. Students will be introduced to “Best Practices” – CDC’s vision of how to run the most effective eMarketing campaigns.

For more information please send your inquiries to education@pivotal.com.

Audience

All MarketFirst users – both technical and non-technical.

Prerequisites

For participants interested with the CDC MarketFirst Integration with Pivotal CRM, knowledge using the Pivotal CRM product.

Topics Covered

Introduction to MarketFirst

- Important MarketFirst components.
- Important eMarketing concepts.
- The marketing process with CDC MarketFirst.
- Description of the data exchanged within the CDC MarketFirst Integration with Pivotal CRM.
- Loggin onto the CDC MarketFirst application.
- Navigation of the CDC MarketFirst interface.
- Introduction to the CDC MarketFirst managers and editors.
- CDC MarketFirst Codes and Code Sets.

Managing Contacts

- Defining a contact.
- Using the Audiences Manager.
- Creating an extended profile.
- Creating a segment.
- Creating a list.

Adding Contacts to MarketFirst

- Adding a person to the CDC MarketFirst database.
- Importing data into MarketFirst using a Databridge
- Checking import task status.
- Creating program-scoped segments.

Building an eMarketing Program

- Creating a new marketing campaign.
- Creating a program to support a marketing campaign.
- Defining program tasks.
- Developing eMarketing documents.
- Inserting an email response filter.
- Launching marketing program.

Topics Covered, Cont'd.

Creating Blueprints

- Save a program as a blueprint.
- Save a document as a blueprint.
- Save a document component as a blueprint.
- Create a campaign blueprint.
- Create a new program from a blueprint.
- Create a new document from a blueprint.

Build an Unsubscribe Program

- Use Unsubscribe Flag from base profile.
- Incorporate a filter into a Send Document task.
- Create an unsubscribe Web page with a confirmation email and Web page.
- Handling un-subscriptions within the CDC MarketFirst Integration with Pivotal CRM

Managing Document Resources

- Access documents and document resources in the Documents Manager.
- Add attachments, images and HTML style sheets to document resources.
- Use the Document Editor to create an unassigned document.

eNewsletter Programs

- Add section groups to documents
- Creating documents using the All Applicable section group option
- Creating documents using the First Applicable section option
- Suspend and resume programs

Reports

- Explore the Reports Manager.
- Identify available reports.
- Run and distribute a report using a CDC MarketFirst program

Web Registration Program

- Create a 'Registration' campaign and program.
- Create Web forms.
- Add an HTML wrapper and company logo to a Web form.
- Insert conditional text to create personalized communications.

Lead Qualification and Ranking

- Use Decision and Assign Value tasks to qualify and rank leads.