
Customer Relationship Management and e-Mail Newsletters

Audience for this course:

This course explains and demonstrates options for setting up a Customer Relationship Management (CRM) system and an e-mail newsletter system. The course builds on material presented in NDA's introductory course *An Introduction to e-Marketing and e-Distribution* which describes the main elements of e-marketing and e-distribution.

Pre-requisite skills:

People attending this course should have previously attended NDA's *An Introduction to e-Marketing and e-Distribution* or have equivalent knowledge and should have basic skills in Microsoft Excel.

Duration

One day.

Course Outcomes

On completion of this course attendees will be able to:

1. Set up a Customer Relationship Management system
2. Write and send an e-mail newsletter

Course Content

Introduction

- About this course
- The value of maintaining and building client relationships
- Pre-requisite skills
- Alternative approaches to CRM and email newsletters

Customer relationship management systems

- How to collect email addresses
- What information to collect
- Privacy requirements
- Commercial CRMs
- Do it yourself CRMs

Tutorial: creating a CRM using Microsoft Excel

- Objectives
- Excel as a database
- A simple CRM database
- Adding new clients
- Sorting clients
- Finding clients
- Filtering clients
- Filtering clients using more than one criteria

E-mail newsletters

- Personal email messages v newsletters
- Newsletter frequency
- Text v html format
- Newsletter content
- The style of writing
- Develop a theme
- Writing the From line
- Writing the Subject line
- Sending newsletters: a recommended approach
- Commercial options for e-mail newsletters

Tutorial: setting up an email newsletter

- Objectives
- My Contacts
- Create
- Send
- Track