



Understanding the marketing potential of The Patron Edge

Classroom training course agenda

Prepared by Eddie Lee

January 2010

Understanding the marketing potential of The Patron Edge classroom training agenda	
OBJECTIVES	<p>By the end of this session you will be able to :</p> <ul style="list-style-type: none"> Understand the potential of data capture within the CRM module Create and administer Data Protection and Scripts Create Marketing campaigns & Marketing channels Link a general Marketing Campaign to all Events or a specific campaign to specific event Create and administer Client Types and Remarks Create a Mailing History Have an overview and run Marketing Campaigns reports Set a profile's template Save a query for later use Generate a report for the extracted data Attach a mailing history to mailed clients Overview and use of all the different criteria used to extract data Extract records and save them as a .csv file Extract specific customers' data (i.e. only email addresses) View and order top 500 results in query result <p>Reports Wizard Sales Profile Postcode Analysis Mailing Returns Report</p>
SUITABLE FOR:	<p>Marketing Team Box Office Management IT Also anyone who needs to extract and analyse data from The Patron Edge</p>
QUESTIONS FOR THE USERS:	<p>What do you want to capture in terms of data? What mailings do you send out now? What extractions do you currently make and would like to make?</p>
ADMINISTRATION	<p>Link a general Marketing Campaign to all Events or a specific campaign to specific event</p> <p>Review Client Types</p> <p>Review Data Protection options and Scripts</p> <p>Link different Marketing campaigns & Marketing channels to different events</p> <p>Assign Event Types to events</p> <p>Assign Interests and Event Groups which can be used in extractions</p>
PRE-MARKETING MAILING EXTRACTION	<p>Set a profile's template</p> <p>Save a query for later use</p> <p>Use Count Records</p> <p>Generate a report for the extracted data</p>

	<p>Attach a mailing history to mailed clients</p> <p>Overview of all the different criteria used to extract data</p> <p>Amend a Criteria after selection</p>
MARKETING MAILING EXTRACTION	<p>Use all the various criteria available to extract data</p> <p>Extract records</p> <p>Save records as a .csv file</p> <p>Extract specific customers' data (i.e. only email addresses)</p> <p>View and order top 500 results in query result</p>
EXTRACTION EXERCISE BASIC	<p>This section covers extractions where only one criteria is used (below there are some ideas but please could you bring one to the training session with you)</p> <p>Clients who have agreed to receive mailings from the organisation</p> <p>Clients who are in a definite surname range</p> <p>Clients who have a specific Client type</p> <p>Clients who live in a specific postcode range</p> <p>Clients who have booked for a specific event or event</p> <p>Clients who have booked for events taking place at a specific Venue</p>
MARKETING REPORTING	<p>Overview and run Marketing Campaigns reports</p> <p>Sales Profile Report</p> <p>Postcode Analysis Report</p> <p>Mailing Analysis Report</p> <p>Marketing Response Report</p> <p>Weekly Sales Comparison</p> <p>Overview of key sales reports in the standard suite of reports</p>
Q&A	<p>Questions from the Training</p>