

CRM Manager Training Programme



This programme is designed to cover key InterAction training requirements a CRM Manager will need to competently administer, configure and manage their InterAction environment.

Total Duration: 5 Days

Pre-Requisites: Knowledge of InterAction Fundamental Concepts

Location: Customer Site



InterAction for Marketing Training

Course Duration: 1 Day

Overview: This course provides the CRM Manager with a best practice approach to common marketing activities using InterAction. The course aims to empower you with the most efficient way to use InterAction for tasks such as Contact Type and Marketing List management, searching and reporting and Event/BD best practices.

Learning Outcomes:

- Understand how InterAction can be used to complete event management
- Understand how InterAction can be used to complete eMarketing processes
- Best practice for bounce back management
- Complete marketing-related tasks in the Windows and Web clients

Course Content:

- Windows and Web Client Overview
- Updating Contact Information
- Folder Structure
- Marketing List Management and Templates
- Managing end-to-end eMarketing processes
- Managing Events
- Data Protection Processes
- Searching
- Import/Export
- Reports



Configuration and Administration Training

Course Duration: 1 Day

Overview: This course provides users with the knowledge to configure and support the InterAction solution. The training can be tailored to best fit your environment, and be delivered based on your needs and requirements; this will provide your CRM Manager with the knowledge to administer and advise best practice use of InterAction.

Learning Outcomes:

- Understand how to configure InterAction
- A high-level overview of maintaining and monitoring InterAction

Course Content:

- Configuring InterAction in the Windows client
 - Contact Types
 - Administrative Folders
 - Templates
 - Profiles
 - Web Client Searches

- Configuring InterAction in the Administrator client
 - Activities
 - Data Change Management
 - Folder Dependency Rules
 - Folder Types
 - Groups
 - Relationships
 - Reminders
 - Scheduled Processes and Synchronisation rules
 - Administering User Accounts
 - Administrative Reports
- InterAction IQ Configuration
- InterAction Data Minder Configuration



Data Steward Training

Course Duration: 2 Days

Overview: The aim of the InterAction Data Steward Training is to provide attendees with best practice approach to maintaining data quality within their InterAction environment. Users will be advised not only how to prevent bad data from being entered but also how to improve the quality of data already in InterAction. On one of the days, you will be introduced to Data Change Management, and the reactive element of data stewardship. The other day introduces the proactive element of data stewardship, using the advanced data quality features to improve the quality of your data as well as the main concepts around importing, exporting and archiving.

Learning Outcomes:

- Realise the importance of data quality and its role in InterAction
- Understand how InterAction can enhance data quality
- Understand the role and responsibilities of a Data Steward

- Learn how to use the DCM Inbox and complete reactive data steward related tasks
- Become proficient in the use of proactive data cleaning tools

Reactive Course Content:

- The importance of data quality in InterAction
- Role and responsibilities of the Data Steward
- Contact creation and editing
- Overview of Data Change Management (DCM)
- Processing of Data Change Management (DCM) tickets
- Ticket management and best practices

Proactive Course Content:

- Using the advanced Data Quality tools
- Strategies for using the advanced Data Quality tools
- Creating and running data quality searches and find & replace
- Importing, exporting and promoting contacts
- Archiving processes
- Data Minder best practice



InterAction Report Training

Course Duration: 1 Day

Overview: This one-day course provides users with a hands-on opportunity to learn the details of the out-of-the-box reporting functionality provided by InterAction. During the course, you will learn tips and tricks for using the reports while learning how to create reports yourselves.

Learning Outcomes:

- Understand the InterAction reporting functionality
- Understand the different report types
- Understand how to edit existing reports
- Understand how to create new reports

Course Content:

- Overview of InterAction Reporting and Summary Lists
- Using the Report Manager
- Working through the Report Designer Functions
- Creating a report
- Editing reports and adding fields
- Summary of Overview Reports
- InterAction export reports
- Report archiving process
- Workshop

