Help meet your sales quota with an e-mail quick campaign

What is a better feeling at the end of the month than having done all the appropriate things to close enough sales to meet or exceed your quota? One way to feel confident that you will close those sales is being able to contact customers quickly about events that they will get excited about, such as end-of-the-month promotions, special offers, and new products. Contacting the right customers about the right products can mean the difference between making your sales quota and falling short.

You can use the quick campaigns feature of Microsoft CRM 3.0 to help you close those sales and make that quota. One of the most popular quick campaigns is the e-mail campaign.

Important

Your system administrator must install a special update to enable your organization to send e-mail messages automatically from quick campaigns, instead of sending them manually through activities. Whether to install this update is a business decision that depends on how your organization wants to handle quick campaign e-mail messages – either manually or automatically. For more information about how to obtain and install this update, see KB 911520 on the Microsoft Support Web site or contact support@consultcrm.co.uk

Creating quick campaigns

You can create quick campaigns in either the Sales or Marketing areas of Microsoft Dynamics CRM. First, you select the people you want to send e-mail messages to. Next, you create the quick campaign itself. As a final quality control step, you can verify the messages Microsoft CRM was able to send, fix any issues in the messages that could not be sent, and then try resending them.

Note

You can perform quick campaigns that include mail merge only from the Microsoft CRM client for Microsoft Office Outlook.

Select your e-mail recipients

There are several ways you can select the recipients for your e-mail quick campaign. Unlike a standard marketing campaign, you can create quick campaigns from:

- Lists in the Leads, Accounts, and Contacts areas
- Existing marketing lists
- Lists that were created from Advanced Find queries that target specific leads, accounts, or contacts

Create the quick campaign

With your Leads, Accounts, or Contacts area list, marketing list, or Advanced Find query open, you're ready to create your e-mail quick campaign.

1. Select the scope of your e-mail campaign. For example, select a specific marketing list or a group of leads in a list.
2. On the **Actions** toolbar, click **Create Quick Campaign**, and then click the option for the scope of your e-mail campaign, such as **For Selected Records** or **For All Records on Current Page**.
3. In the **Create Quick Campaign Wizard**, click **Next**.
4. On the **Specify the Campaign Name** page, in the **Name** box, type a name for your quick campaign, and then click **Next**.
5. On the **Select the Activity Type and Owners** page, for **Activity type**, click **E-mail**.
6. For **Assign these activities to**, verify that **Me** is selected, and then click **Next**.
7. On the **Specify the Content of the Activity** page, type a subject, the e-mail message, and any other information that you want to include in your e-mail message or in Microsoft CRM *about* your messages.
   For example, if the promotion is only for a short time and you want to make sure that you send these e-mail messages out immediately, you could set the priority to High and the due date to tomorrow.
   Note
   Although the **Owner** box is marked as a required field, you cannot edit it on this page. Microsoft Dynamics CRM will automatically add the owner you selected in the previous step when the application creates the e-mail messages.
8. When you've finished setting up your e-mail message, click **Next**.
9. On the **Completing the Create Quick Campaign Wizard** page, verify that the information about your quick campaign is correct, and then click **Create**.

If your system administrator has installed the update mentioned previously to Microsoft CRM, the application sends your e-mail messages when you click **Create**. If your organization's implementation does not include this update, you must open each e-mail activity and send the message manually.

Make sure that the e-mail messages were sent

If you want to double-check that Microsoft CRM sent your e-mail messages, you can check the status of the e-mail activity the application created for each message.

1. Under **Marketing**, click **Quick Campaigns**.
2. Double-click the quick campaign you created earlier.
3. In the **Quick Campaign** form, scroll to the right until you see the **Status Reason** column.
4. Check to make sure that the status is listed as **Sent** and not **Draft**.
5. If any of the e-mail activities are listed with the **Draft** status, open them, correct any issues that may have caused the failure (such as a missing e-mail address), and then click **Send**.