MARKETING AUTOMATION & CRM

Course Overview

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1. Course Overview

Headings	Details
Course Code	ENT-CRM
Product Title (Internal)	CRM Applications
Course Title (External)	NA
Learning Mode	Full-time/ Part-time
Delivery Mode	Synchronous & Asynchronous E-learning
Target Persona	• Enterprises who would like to send their employees to gain CRM application skills. • Enterprises who would like to hire fresh candidates and send them for training to acquire CRM Application skills.
Entry-Prerequisites	• Academic: Minimum one credit in N Level or its equivalent • English Proficiency – Minimum IELTS 5.5 or its equivalent • Age – Minimum 21 years • Work Experience – Not mandatory
SSG Course Reference No	NA
Course Validity Date	NA
Course Developer	Lithan Academy
Relevant Job roles after completion of the course	CRM Consultant

2. Course Brief

Job prospects for learners completing the "HubSpot CRM" course are promising, with various opportunities in the marketing and sales domain. After mastering the HubSpot CRM platform, learners can pursue job roles such as CRM Specialist, Marketing Automation Specialist, and Customer Support Manager. Organizations across industries seek professionals proficient in HubSpot CRM to streamline their sales processes, enhance lead generation, and deliver exceptional customer experiences. This course empowers learners to unlock their potential and seize these exciting career opportunities in today's competitive market.

The "HubSpot CRM" course is a comprehensive program designed to equip learners with the skills and knowledge required to excel in managing customer relationships and implementing inbound marketing strategies using the HubSpot CRM platform. The course covers essential HubSpot CRM concepts and Capstone projects, each focusing on critical aspects of HubSpot CRM and its applications in real-world scenarios.

In the "Introduction to HubSpot CRM" unit, learners will gain a foundational understanding of HubSpot CRM's features and significance in modern marketing practices. They will explore the CRM interface, user accounts, and permissions, setting the groundwork for their CRM journey.

The "Managing your contact with CRM" unit emphasizes efficient contact management by organizing contacts and companies within HubSpot CRM. Learners will learn to use custom properties and dynamic lists for effective segmentation, empowering them to target specific customer segments strategically.

The "Sales Pipeline and Deal Management" unit will delve into designing and managing a sales pipeline tailored to individual business needs. Learners will enhance their sales processes by automating workflows and optimizing deal stages for increased efficiency and revenue growth.

In the "Marketing Integration and Lead Management" unit, learners will learn to integrate marketing tools with HubSpot CRM to capture and nurture leads effectively. They will create automated lead nurturing campaigns, drive higher conversion rates, and deliver qualified leads to the sales team.

The "Customer Support and Service Management" unit will focus on providing exceptional customer support using HubSpot CRM's ticket and case management features. Learners will learn to resolve customer inquiries promptly, ensuring elevated customer satisfaction and loyalty.

The course concludes with a Capstone project, where learners will apply their knowledge and skills in a real-world scenario. They will optimise the sales process, generate and nurture leads, segment customers, analyse marketing campaigns, and provide exceptional customer support using HubSpot CRM.

Upon completing the "HubSpot CRM" course, learners will emerge as skilled CRM professionals capable of implementing effective inbound marketing strategies, managing customer relationships, and driving business success using the powerful tools provided by HubSpot CRM.

3. Course KSA Summary

Knowledge Statements:
- Analyze the features and significance of HubSpot CRM in modern marketing practices.
- Summarize the process of organizing contacts and companies using custom properties and dynamic lists.
- Identify the steps involved in designing and managing a tailored sales pipeline in HubSpot CRM.
- List the techniques to integrate marketing tools and capture leads effectively in HubSpot CRM.
- Recognize the importance of ticket and case management in delivering exceptional customer support.

Skills Statements:

- Apply HubSpot CRM tools to optimize sales processes and enhance revenue growth.
- Utilize custom properties and dynamic lists for effective customer segmentation in CRM.
- Create automated lead nurturing campaigns to drive higher conversion rates in marketing efforts.
- Employ marketing analytics to measure campaign performance and derive insights for improvement.
- Implement HubSpot CRM features for timely resolution of customer inquiries and issues.

Ability Statement:
Implement HubSpot CRM to streamline sales, enhance marketing efforts, segment customers strategically, and deliver exceptional customer support.

4. Course Summary

4.1 Module-Session Details

Sl No	Module Names	Module Code	E-Learning (Async)	Flipped Class (Sync)	Assignment Sync	Project Planning Sync	Project Imple Async	Assessment (Sync)	Total Hours
					Mentoring Support				
1	WSQ Marketing Automation & CRM Applications (SF)	ENT-CCS	12	12	12	12	12	0.5	60.5
2	WSQ CRM - Capstone Project (SF)	ENT-CCR	0	12	0	24	24	0.5	60.5
	TOTAL		**12**	**24**	**12**	**36**	**36**	**1**	**121**

4.2 Learning Mode & Duration

Learning Mode	Course Duration	Guided Learning Hours	Hours/Week	days/Week	Hours/Day
Full-time	4 weeks	120 hours	30 hours/week	4 days/week	8 hours/day
Part-time	17 weeks (7 weeks, 10 weeks)	120 hours	6 hours/week	3 days/week	2 hours/day

5. Module Details – Marketing Automation & CRM

5.1 Module Brief

In the "HubSpot CRM" module, learners will acquire essential knowledge and skills encompassing various facets of HubSpot CRM.

Introduction to HubSpot CRM will familiarize learners with the foundational aspects of HubSpot CRM, including its features and significance in modern marketing practices. Learners will be equipped with the expertise to manage and efficiently organize contacts within the CRM system, utilizing custom properties and dynamic lists for effective segmentation.

It will further delve into the intricacies of creating and overseeing a robust sales pipeline, empowering learners to track and optimize deals throughout the sales process. Marketing Integration and Lead Management unit will help to explore the seamless integration of marketing tools with HubSpot CRM, enabling learners to capture and monitor leads generated through marketing efforts.

Learners will learn to utilize the CRM system to handle customer support tasks proficiently, including ticket and case management. Learners will complete projects that reinforce their knowledge and practical abilities by incorporating the learning units. Upon successful completion of the module, participants will be proficient in optimizing HubSpot CRM, encompassing the importation and organization of contacts, efficient deal management, marketing integration for lead tracking, and the provision of exemplary customer support.

Instructional Units:
1. Introduction to HubSpot CRM
2. Managing your contact with CRM
3. Sales Pipeline and Deal Management
4. Marketing Integration and Lead Management
5. Customer Support and service management

Module Project:
Project Objective: Learn to optimize HubSpot CRM: Import contacts, manage deals, integrate marketing, and provide excellent customer support.

Project Tasks:

1. Import and categorize contacts using custom properties in HubSpot CRM.
2. Design and manage a sales pipeline to track deals efficiently.
3. Integrate marketing tools and track leads seamlessly with HubSpot CRM.
4. Create and manage customer support tickets and cases in CRM.
5. Implement user accounts and permissions for effective CRM management.

5.2 Module Session Plan

Session No#	Session Type	Day no#	Duration Hrs
1	E-Learning on IU 1	1	2
2	Flipped Class on IU 1	1	2
3	Mentoring Support - Assignment on IU 1	2	2
4	E-Learning on IU 2	3	2
5	Flipped Class on IU 2	3	2
6	Mentoring Support - Assignment on IU 2	4	2
7	E-Learning on IU 3	5	2
8	Flipped Class on IU 3	5	2
9	Mentoring Support - Assignment on IU 3	6	2
10	E-Learning on IU 4	7	2
11	Flipped Class on IU 4	7	2
12	Mentoring Support - Assignment on IU 4	8	2
13	E-Learning on IU 5	9	2
14	Flipped Class on IU 5	9	2
15	Mentoring Support - Assignment on IU 5	10	2
16	E-Learning on IU 5	11	2
17	Flipped Class on IU 5	11	2
18	Mentoring Support - Assignment on IU 5	12	2
19	Mentoring Support – Project Planning -1	13	2
20	Mentoring Support – Project Planning -2	14	2
21	Mentoring Support – Project Planning -3	15	2
22	Mentoring Support – Projects Implementation 1	16	2
23	Mentoring Support – Project Planning -4	17	2
24	Mentoring Support – Project Planning -5	18	2
25	Mentoring Support – Project Planning -6	19	2
26	Mentoring Support – Projects Implementation 2	20	2
27	Mentoring Support – Project Planning -7	21	2
28	Mentoring Support – Project Planning -8	22	2
29	Mentoring Support – Project Planning -9	23	2
30	Mentoring Support – Projects Implementation 3	24	2
31	Summative Assessment (per learner)	25	30 min

6. Module Details – CRM - Capstone Project

6.1 Module Brief

In the "HubSpot CRM - Capstone" module, learners will acquire comprehensive knowledge and essential skills by applying the concepts learned in the previous instructional units and project tasks. The module encompasses five project tasks, each building upon the expertise gained from the learning units.

Learners will learn to optimize the sales process by designing and implementing a customized sales pipeline in HubSpot CRM. Through automation and seamless integration, they will enhance the efficiency of sales activities and improve deal management. Learners will develop a robust lead generation strategy. By integrating marketing tools with HubSpot CRM, they will capture and nurture leads through automated campaigns, leading to improved conversion rates.

Learners will delve into customer segmentation and personalization, utilizing HubSpot CRM's features like custom properties and dynamic lists. They will learn to implement segment customers effectively, create personalized marketing campaigns for enhanced customer experiences, and integrate marketing analytics with HubSpot CRM. to measure campaign performance, analyze key metrics, and gain insights to optimize future marketing efforts.

Finally, the capstone project will require learners to implement a customer support system within HubSpot CRM. By effectively managing tickets and cases, they will ensure prompt and efficient resolution of customer inquiries and issues.

Upon completing the "HubSpot CRM Capstone Project" module, participants will have developed a comprehensive understanding of HubSpot CRM's functionalities and gained practical experience in optimizing sales processes, lead generation, customer segmentation, campaign analytics, and customer support. This module will equip learners with valuable skills to apply in real-world scenarios and enhance their capabilities as HubSpot CRM professionals.

Through this capstone project, learners will apply the knowledge and skills acquired from the instructional units to demonstrate their mastery of HubSpot CRM. They will be able to showcase their ability to optimize sales processes, generate and nurture leads effectively, segment customers for personalized marketing, utilize marketing campaign analytics, and provide exceptional customer support using the HubSpot CRM platform.

Instructional Units:
1. Identify product, User Persona
2. User stories, product backlog
3. Sprint planning
4. User requirements
5. **Project Design & Architecture**
6. **Project planning**

Module Project:

Project Objective: Optimize sales, nurture leads, segment customers, analyze campaigns, and deliver exceptional support.

Project Tasks:

1. Design and implement a tailored sales pipeline in HubSpot CRM, integrating all relevant deal
2. Devise a comprehensive lead generation strategy, integrating marketing tools
3. Utilize custom properties and dynamic lists within HubSpot CRM to segment customers
4. Integrate marketing analytics with HubSpot to measure the performance of marketing campaigns.
5. Set up a robust customer support system in HubSpot CRM

6.2 Module Session Plan

Session No#	Session Type	Day no#	Duration Hrs
1	Flipped Class on IU 1	1	2
2	Flipped Class on IU 2	2	2
3	Flipped Class on IU 3	3	2
4	Flipped Class on IU 4	4	2
5	Flipped Class on IU 5	5	2
6	Flipped Class on IU 6	6	2
7	Mentoring Support – Project Planning -1	7	2
8	Mentoring Support – Projects Implementation 1	8	2
9	Mentoring Support – Project Planning -2	9	2
10	Mentoring Support – Projects Implementation 2	10	2
11	Mentoring Support – Project Planning -3	11	2
12	Mentoring Support – Projects Implementation 3	12	2
13	Mentoring Support – Project Planning -4	13	2
14	Mentoring Support – Projects Implementation 4	14	2
15	Mentoring Support – Project Planning -5	15	2
16	Mentoring Support – Projects Implementation 5	16	2
17	Mentoring Support – Project Planning -6	17	2
18	Mentoring Support – Projects Implementation 6	18	2
19	Mentoring Support – Project Planning -7	19	2
20	Mentoring Support – Projects Implementation 7	20	2
21	Mentoring Support – Project Planning -8	21	2
22	Mentoring Support – Projects Implementation 8	22	2
23	Mentoring Support – Project Planning -9	23	2
24	Mentoring Support – Projects Implementation 9	24	2
25	Mentoring Support – Project Planning -10	25	2
26	Mentoring Support – Projects Implementation 10	26	2
27	Mentoring Support – Project Planning -11	27	2
28	Mentoring Support – Projects Implementation 11	28	2
29	Mentoring Support – Project Planning -12	29	2
30	Mentoring Support – Projects Implementation 12	30	2
31	Summative Assessment (per learner)	31	30 min

7. Credentials & Price

7.1 Credentials

Name of the Credentials	Details
Academic Qualification	NIL
EduCLaaS Job Role Certification	CRM Consultant
Industry Skills Certification	Marketing Automation & CRM Applications • Hubspot Marketing Software Certification CRM- Capstone Project • Hubspot Sales Software Certification • Service Hub Software Taking this certification is not mandatory. However, if the learner wishes to pursue it, they need to register for the examination directly with the vendor after paying the necessary fees.
Statement of Attainment	Marketing Automation & CRM Applications • ICT-MKI-4002-1.1: Customer Behaviour Analysis CRM- Capstone Project • ICT-MKI-4001-1.1: Consumer Intelligence Analysis