



Helping ScotPac get the most out of Microsoft Dynamics 365 Sales and Marketing

We worked with ScotPac to understand their learning objectives and provided tailored online training for the marketing team and technical staff. This increased the marketing team's productivity and allowed ScotPac to create more effective marketing campaigns, delivering better results for their customers.

ScotPac, a leading financial services company in Australia, adopted Microsoft Dynamics 365 Marketing to manage its growing customer base. However, the marketing team struggled to use the software effectively and the technical staff was unable to provide the necessary support.

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The training sessions were engaging and interactive, and covered key features of Dynamics 365 Marketing, such as Customer Journeys, Email Marketing, Workflow, Marketing Pages, Marketing Forms, and Power Automate. As a result of the training, the marketing team and technical staff were more confident and skilled in using the software, enabling ScotPac to provide a better customer experience..

ScotPac is a leading financial services company in Australia, providing a range of banking and investment products to retail and corporate customers. Over the years, ScotPac has expanded its customer base and now has a large number of customers across the country. To manage its growing customer base, ScotPac adopted Microsoft Dynamics 365 Marketing, a cloud-based marketing automation platform. However, despite its many features, the marketing team at ScotPac was having difficulty getting to grips with the software and making the most of its capabilities.

The Brief

ScotPac's marketing team was facing several challenges when it came to using Dynamics 365 Marketing effectively. Firstly, they lacked the knowledge and experience to take advantage of the software's powerful marketing tools and features, such as Customer Journeys, Email Marketing, Workflow, Marketing Pages, Marketing Forms and Power Automate. Secondly, the technical staff responsible for setting up and maintaining the software were also struggling to get to grips with the software, and were not able to provide the support and guidance the marketing team needed.

In summary:

- Identify and prioritize key learning objectives for individuals and the Marketing team.
- Target specific learning objectives and at the same time encourage best practice methods and processes for Microsoft Dynamics Marketing and Sales.
- Contextual training is needed taking in consideration specific needs and pain points.
- Deliver on-line private training for the Marketing and Sales teams.

The Solution

To help ScotPac overcome these challenges, we worked closely with the marketing team and the technical staff to understand their learning objectives and create tailored training courses. Our team of experts designed and delivered online training sessions, focusing on the key features and functionalities of Dynamics 365 Marketing, including Customer Journeys, Email Marketing, Workflow, Marketing Pages, Marketing Forms and Power Automate.

The training was delivered in a way that was engaging and interactive, allowing the marketing team to ask questions and get hands-on experience with the software. The technical staff received more in-depth training, covering the setup and configuration of Dynamics 365 Marketing, as well as advanced features like Power Automate.

As a result of the training, the marketing team at ScotPac became more confident and skilled in using Dynamics 365 Marketing, and the technical staff were better equipped to support and maintain the software. This increased the marketing team's productivity and enabled them to create more effective marketing campaigns that delivered results for ScotPac's customers.

In conclusion, by working closely with ScotPac, our team of experts were able to help the marketing team and the technical staff get to grips with Dynamics 365 Marketing and make the most of its powerful features. This increased the marketing team's productivity, and allowed ScotPac to provide a better experience to its customers.

Visit www.ttsolutions.com.au to read our full case studies, or call 1300 667 577 for further information.

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