Zoho Marketing Suite Mastery

Mastering Campaigns, Conversions, Social Engagement, Surveys, and Events with Zoho

Course Overview

This comprehensive training is designed to empower marketing professionals, content creators, and small business teams with in-depth knowledge of Zoho's marketing tools. You'll learn how to effectively execute multichannel marketing strategies, optimize web and social engagement, collect actionable insights, and organize events—all using Zoho's integrated suite of products:

- Zoho Campaigns – email marketing automation
- Zoho PageSense – conversion optimization
- Zoho Social – social media management
- Zoho Survey – data collection and analysis
- Zoho Backstage – event management and promotion

Prerequisites

- Fundamental understanding of digital marketing, analytics, and customer engagement
- No Zoho experience needed; however, familiarity with any CRM, ESP, or web analytics tools will be helpful

Table of Contents

- Automation: Workflows & Autoresponders
- Ecommerce Targeting & Audience Segmentation
- Advanced Campaigns: Events, RSS, Surveys
- Email Best Practices & FAQs

Module 2: Zoho PageSense – Conversion Rate Optimization

- Intro to CRO and PageSense Overview
- Creating & Managing Spaces, Projects, Snippets
- Integrations & General Settings
- Web Analytics: Acquisition & Behavioral Data
- Conversion Funnel Tracking and Drop-off Analysis
- Heatmaps, Form Analytics & Session Recordings
- A/B & Split URL Testing
- Website Personalization by Audience Attributes
- Visitor Engagement: Polls, Popups, Push Notifications
- Recap and Q&A

Module 3: Zoho Social – Social Media Management

- General Setup: Accounts, Roles, Notifications
- Publishing & Scheduling Posts
  - Social Library, Hashtags, UTM Tags, AI Writing (Zia)
  - Image Editing, Stories, Bulk Scheduling
- Visual Calendar, Mobile & Browser Tools (zShare)
- Engagement: Inbox, Lead & Ticket Capture
- Analytics: Brand Health, Custom Reports
- Agency Tools: Multiple Brands, Clients, Audit Log

Module 4: Zoho Survey – Data Collection and Feedback

- Survey Use Cases by Industry
- Creating Surveys: Scratch, Templates, Logic, Piping
- Advanced Configurations: Triggers, Variables, Anti-Spam
- Distribution: Email, Inline, Embed, Popups
- Reporting: Trends, Filters, Sentiment, Custom Reports
- Scheduling Reports, Sharing & Export Options
- Integrations: CRM, Campaigns, Analytics, Slack, Webhooks
- Portal and Department Management

Module 5: Zoho Backstage – Event Management & Promotion

- Introduction to Backstage and Course Objectives
- Portal Setup: Organization Info, Currency, Payouts, Taxes
- Branding and Custom Domains
- Team Setup: Roles, Permissions, Approvals
- Creating Events: Virtual/In-person
- Ticketing: Classes, Promo Codes, Registration Management
- Event Promotion: Social Media, Blogs, Email Campaigns
- Microsite Design and Customization
- Attendee Communication & Badge Management
- Conducting Events: Check-ins, Live Polls, Q&A
- Analytics: Ticket Sales, Session Data, Feedback
- Advanced Features: Webhooks, Privacy Settings, Zia Bot
- Additional Resources: Knowledge Base, Forums, Support