



MARKETING AUTOMATION

M . WORKFLOWS . LEAD SCORING
CHATBOTS . WHATSAPP . HANDOVER
DATA HYGIENE . REPORTING

DURATION

40 Hours

LEVEL

**Intermediate to
Advanced**

MODULES

8

MODE

**Classroom ·
Online · Hybrid**

01 COURSE OVERVIEW

A marketing automation course on connecting CRM, campaigns and sales handover into one working system.

The course covers the plumbing that makes automation reliable: data model, field hygiene, deduplication, lifecycle definitions and sales handover rules — then builds workflows, scoring and chat automation on top.

Learners build an end-to-end lead flow from form fill to sales task with reporting.

WHO IT IS FOR

Marketing operations staff

CRM administrators

Sales operations teams

Agency automation specialists

PREREQUISITES

Marketing fundamentals and comfort with spreadsheets. No coding required.

02 LEARNING OUTCOMES

01 Define a lifecycle model and stage criteria.

03 Build multi-branch nurture workflows.

05 Automate chat, WhatsApp and form routing.

07 Report on pipeline contribution by source.

02 Keep CRM data clean and deduplicated.

04 Score leads on fit and behaviour.

06 Set handover rules and SLAs with sales.

01 AUTOMATION FOUNDATIONS

What to automate

Data model

Consent and preferences

Lifecycle stages

Field hygiene

02 CRM SETUP

Objects and relationships

Deduplication

Integrations

Pipelines

Data imports

Permissions

TOOLS

HUBSPOT

ZOHO CRM

03 WORKFLOW BUILDING

Triggers

Goals and exits

Error handling

Delays and branches

Internal notifications

PRACTICAL

NURTURE WORKFLOW

04 LEAD SCORING AND ROUTING

Fit vs behaviour scoring

Score decay

SLA rules

Negative scores

Territory and round-robin routing

05 CONVERSATIONAL AUTOMATION

Chatbot flows

Templates and approvals

FAQ automation

WhatsApp Business API basics

Live chat handover

PRACTICAL

CHAT FLOW

06 INTEGRATION

Zapier, Make and n8n

Forms and landing pages

Data warehouse export

Webhooks

Ads lead sync

PRACTICAL

CROSS-TOOL AUTOMATION

07 SALES ALIGNMENT

Lead definitions

Task automation

Feedback loops

Handover process

Sequences

Disqualification reasons

08 REPORTING AND GOVERNANCE

Funnel reporting

Workflow audits

Documentation

Source attribution

Naming conventions

PROJECT

END-TO-END LEAD FLOW

04 ASSESSMENT & CERTIFICATION

Module assignments and labs

25%

Mini projects

20%

Internal assessments

15%

Final project and review

40%

CERTIFICATION

Learners who complete all modules, submit the final project and clear the review receive a course completion certificate from Kaizen Infinities Private Limited. Project work is documented for the learner's portfolio, and interview preparation is included in the closing sessions.

05 CAREER OUTCOMES

ROLES THIS PROGRAMME PREPARES FOR

MARKETING AUTOMATION SPECIALIST

MARKETING OPERATIONS ANALYST

CRM MANAGER

GROWTH OPERATIONS ENGINEER

SALES OPERATIONS ANALYST

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