



**Marketing Automation  
on Odoo :  
The Ultimate Guide to  
build a winning strategy**

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## Introduction

### Campaign Automation: Boost Your ROI and Strengthen Customer Loyalty

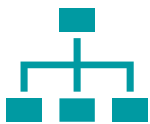
## A Solution Tailored to Your Needs

Marketing campaign automation has become an essential tool for effective and personalized communication. This approach not only enhances efficiency but also ensures you meet your customers' expectations with precision and responsiveness. Our solution is designed to help you:

- Automate your communication processes, eliminating repetitive tasks and saving valuable time
- Foster customer loyalty with targeted and meaningful interactions that strengthen relationships.
- With our comprehensive and user-friendly platform, you can take control of your marketing strategy, delivering impactful campaigns that resonate with your audience. Let's unlock the full potential of automation for your business success.

## Main features

### 1. Create customized workflows



Every company is unique, as are its marketing needs. With our solution, you can create workflows completely tailored to your objectives and your audience. These workflows enable you to define sequences of actions that are automatically triggered according to predefined criteria.

### 2. Send emails and execute server actions



Our tool lets you manage multi-channel marketing campaigns. In addition to emails, you can execute server actions to synchronize your databases, update customer profiles or launch specific promotions based on the actions performed by your users..

### 3. Triggers based on customer behavior



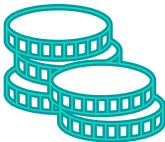
Understanding your customers' behavior is the key to a successful marketing strategy. Our intelligent triggers enable you to analyze and act on your customers' actions in real time.

## Key objectives



Marketing automation in Odoo allows you to centralize marketing efforts to ensure consistency in the way you communicate with your prospects and customers. This includes multi-channel campaigns (email, SMS, push notifications) with precise tracking.

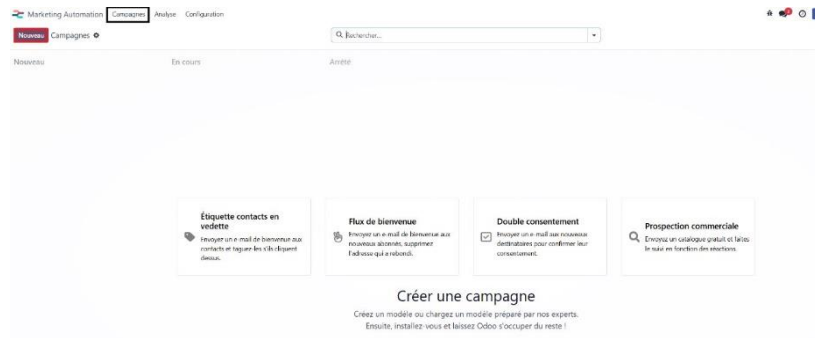
Odoo's tools enable you to automate contact segmentation and send messages tailored to your customers' specific behaviors, needs or preferences.



With Odoo, you can use advanced segmentation criteria (demographics, purchase history, interactions) to target your audiences. Automation scenarios enable you to create personalized customer paths and optimize interactions.

## Marketing campaigns

1. **Create a campaign from scratch:** Launch a new, fully customized campaign based on your ideas and objectives.
2. **Use a predefined template:** Save time by selecting a prepared template, designed to meet the most common marketing needs.



3. Once your campaigns are underway, you can easily access **the complete list of your campaigns** and track their progress according to their status (in progress, completed, draft, etc.)

The screenshot shows the 'Marketing Automation' interface in Odoo, displaying campaign progress tracking. The top navigation bar includes 'Marketing Automation', 'Campagnes', 'Analyse', and 'Configuration'. Below the navigation, there are tabs for 'Nouveau', 'En cours', and 'Arrêté'. A search bar is visible. The main content area displays three columns: 'Nouveau', 'En cours', and 'Arrêté'. Each column contains a table with campaign details and progress tracking.

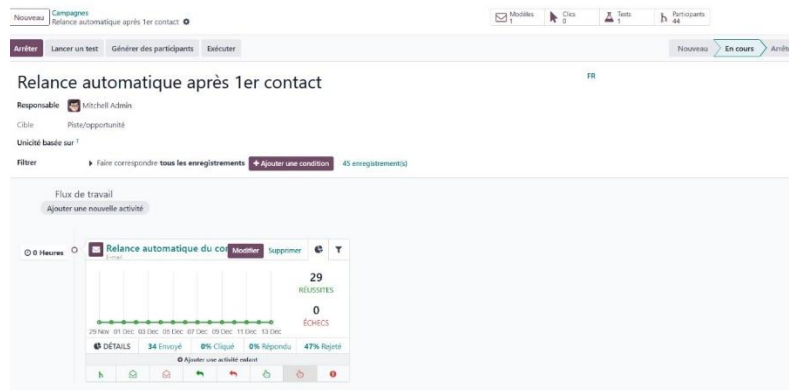
Nouveau		
Prospection commerciale		
TOTAL	EN COURS	TERMINÉ
0	0	0

En cours		
Test 2		
TOTAL	EN COURS	TERMINÉ
15	0	15
Relance après 1er contact		
TOTAL	EN COURS	TERMINÉ
14	0	14
Relance automatique après 1er contact		
TOTAL	EN COURS	TERMINÉ
44	0	44

Arrêté		
Test [2]		
TOTAL	EN COURS	TERMINÉ
0	0	0

#### 4. Analyze campaign performance with key indicators::

- Success rates: Track the impact of your campaigns.
- Open rate: Measure the commitment of your recipients.
- Percentage of responses: Analyze returns and adjust your strategy.



## How to analyze your campaigns?

Odoo provides you with powerful and flexible tools for analyzing the results of your marketing campaigns. You can easily filter your data and use the “group by” option to aggregate relevant information. This allows you to highlight key points and identify trends that will have the greatest impact on your future campaigns.

Tracking activities is also simplified thanks to a global view offered by the various options available in Odoo. Whether you prefer a kanban view to visualize your milestones, a graphical view to interpret your data or a calendar view to organize your deadlines, you'll find the tool to suit the way you work.

In addition to the global view, Odoo lets you analyze your campaign participants in detail. You can quickly identify the targets for whom your emails or actions have been most effective, while pinpointing those that require adjustments to better capture their attention.

For even more detailed analysis, Odoo offers list views and pivot tables. These tools allow you to structure your data differently and present your results in a clear, organized way. They are ideal for extracting specific insights or sharing analyses with your team.

Finally, to save time on recurring campaigns, Odoo lets you save your filter and grouping configurations. This means you can reuse them for similar campaigns, which is particularly useful if you regularly send the same type of e-mails.

Thanks to these features, Odoo transforms your marketing data into a real performance lever to optimize your actions and better achieve your objectives.

*With Odoo, analyzing your marketing campaigns becomes both simple and effective. Intuitive tools such as filters, groupings, dynamic views and participant analysis give you clear insights for adjusting your actions. The ability to save your configurations saves you precious time on recurring campaigns. By centralizing all these features, Odoo gives you powerful leverage to continually improve your marketing performance and maximize the impact of your campaigns.*

Want to learn more about  
Marketing Automation?

Click here



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