



# Course Description



Master CRM automation with IDT's BigBot CRM Course — a beginner-friendly program that teaches you how to manage leads, automate workflows, and grow businesses using smart tools and AI.

In just three months, you'll learn to build funnels, handle client communication, create automated follow-ups, and integrate WhatsApp, Facebook, and Google tools.

You'll complete real-world projects, build a CRM portfolio, and gain skills that are in high demand in marketing and sales industries.

Our expert trainers offer personalized guidance to help you succeed.

Join us at the Institute of Digital Technology (IDT) in Okara and step into the world of digital automation.

Reserve your seat now — and start your journey as a CRM expert.





#### **Course Duration**

Total 3 Month's & 2 Days/Week 3pm to 6pm



#### Learning Mode

Physical Classes



#### **Course Fees**

Rs. 15,000 / month Total Course Fee Rs. 45,000

## Target Audience

Digital Marketers, Marketing Assistants, Freelancers, CRM Specialists, Customer Support Teams, Sales Executives, Admin Officers, Entrepreneurs, and anyone looking to automate and grow their business with The BigBot CRM.





# Tools You'll Learn:

- The BigBot CRM (Full Access)
- The BigBot Al Receptionist & Al Caller
- The BigBot Workflow Automation
- Funnel Builder & Calendar Integration
- Email & SMS Marketing Automation
- Review Management Tools
- Integration with WhatsApp, Facebook, Instagram

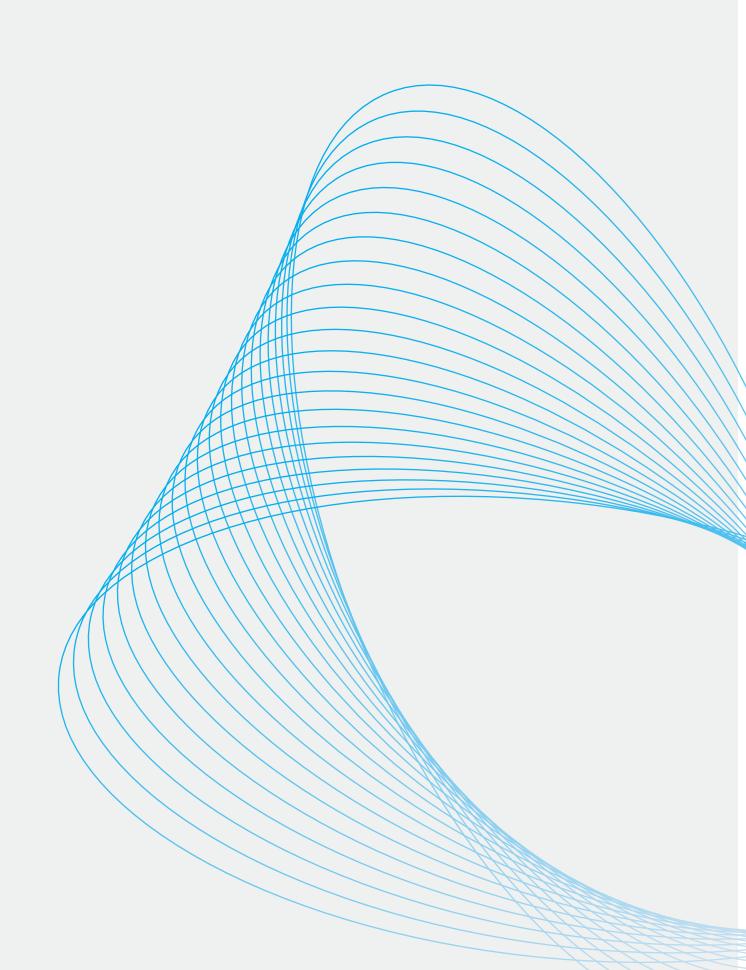


# Course Objectives

### This course will help you:

- Understand CRM workflows and automation logic
- Build custom sales pipelines and lead funnels
- Automate client communication using Al
- Launch real CRM systems with The BigBot
- Prepare for freelancing and remote CRM jobs

Turn your creativity into a career with IDT!





# Certification





A Certificate from IDT will be awarded to students who successfully complete the course, finish their automation projects, and maintain 90% attendance.



# Module 1: CRM Foundations & Contact Management

#### Overview:

Get started with The BigBot CRM platform and learn how to build a strong customer database.

- CRM Dashboard Overview
- Adding, tagging, and managing leads
- Smart segmentation and filters
- Contact activity tracking
- CRM pipeline structure explained





- CRM Executive
- Lead Management Assistant
- Customer Support CRM Officer
- Sales Pipeline Coordinator
- Client Data Administrator
- Agency CRM Setup Assistant



# Module 2: Funnels, Forms & Appointment Booking

#### Overview:

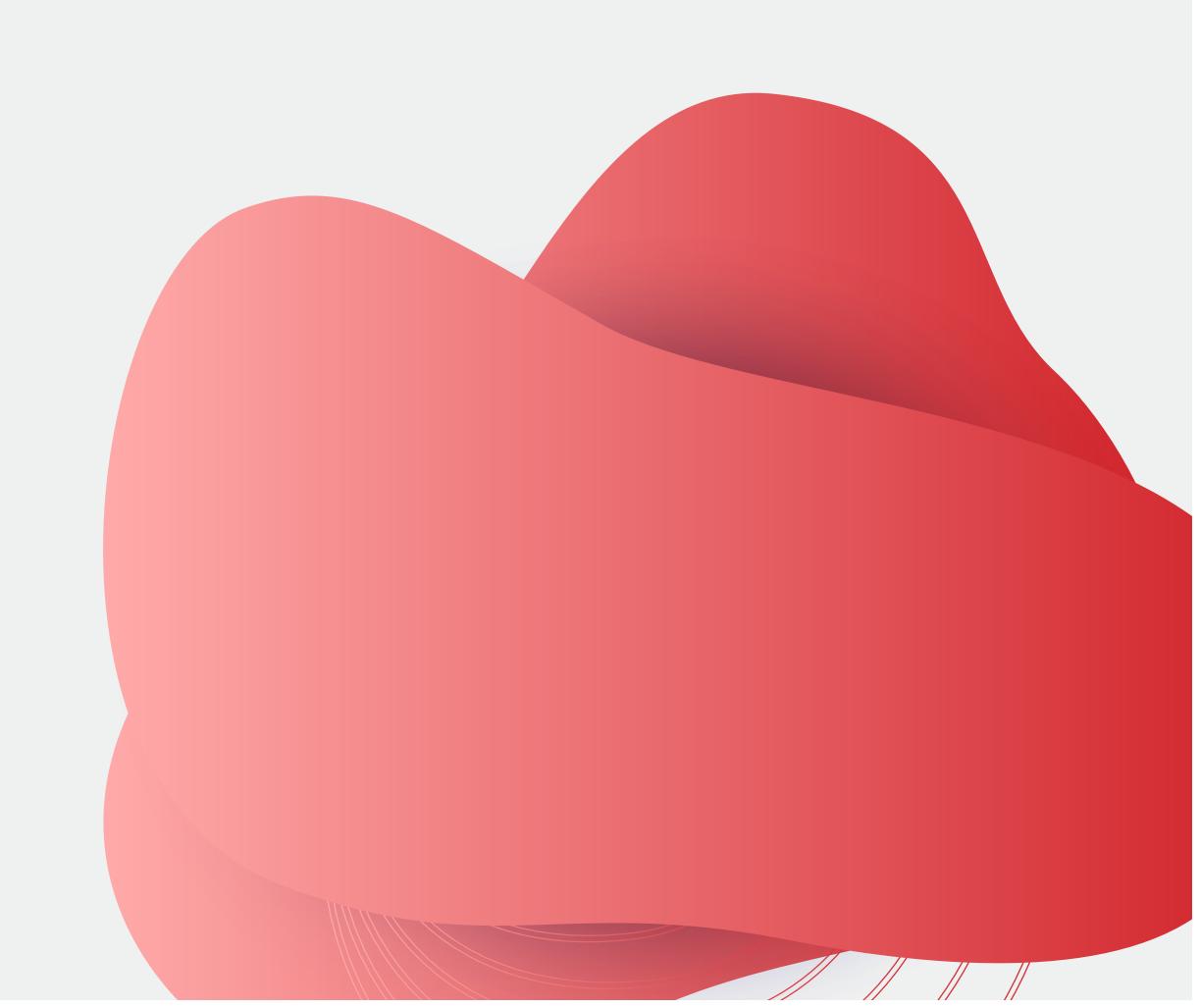
Build lead generation funnels, smart forms, and booking calendars.

- Drag & drop funnel builder
- Embedding forms and surveys
- Calendar integration with reminders
- Connecting forms to automation
- Best practices for high-converting pages





- Funnel Builder
- Appointment Booking Specialist
- Lead Capture Expert
- Landing Page Designer
- Form & Survey Integrator
- Sales Funnel Coordinator



# Module 3: Workflow Automation & Al Assistant

#### Overview:

Master The BigBot's automation builder and AI-powered receptionist system.

- Workflow triggers and conditional logic
- Auto-reply via SMS & Email
- Al Receptionist: 24/7 call answering
- Al Outbound Caller setup
- Real-time lead nurturing via automation





- Workflow Automation Specialist
- Al Receptionist Manager
- Follow-Up Automation Expert
- CRM Strategy Implementer
- Inbound Call Automation Handler
- Auto Responder Builder

# Module 4: Social Media, Webchat & Review Tools

#### Overview:

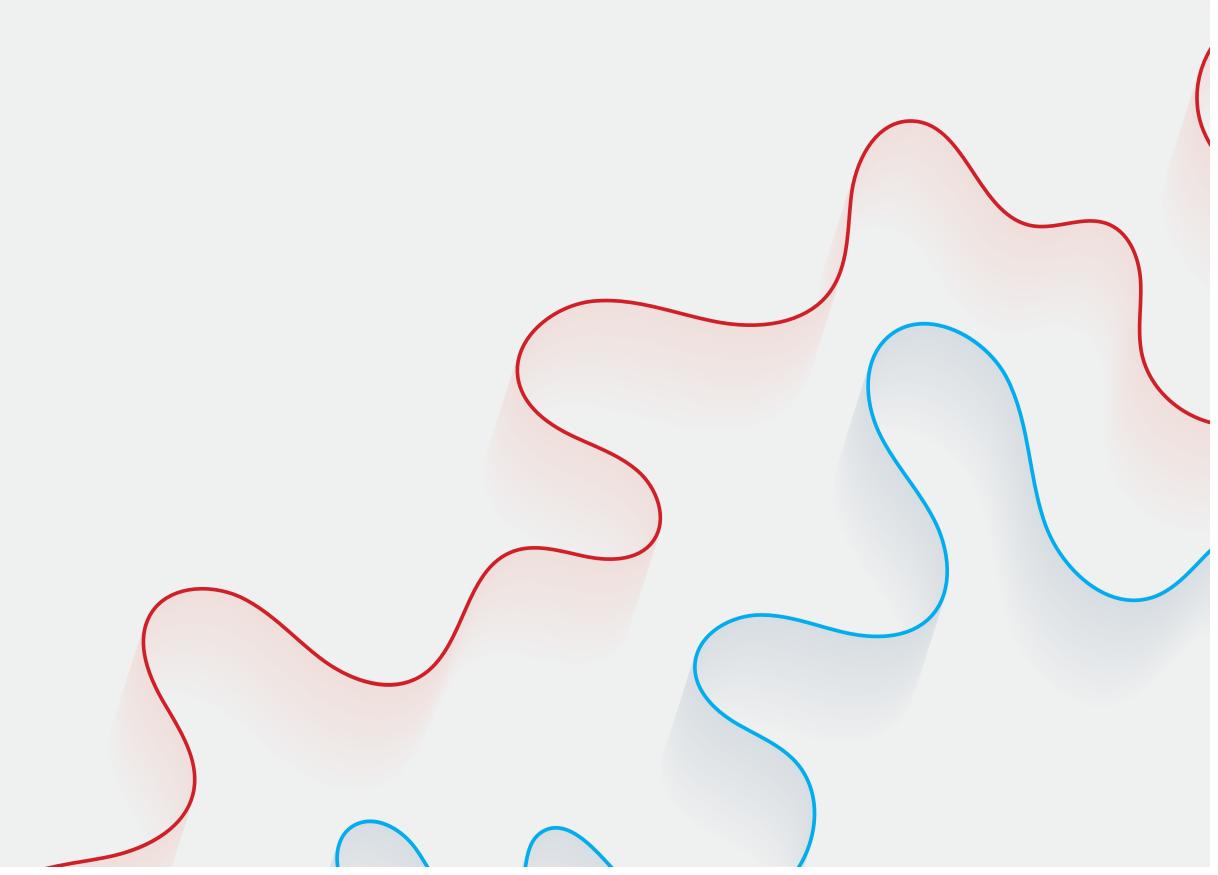
Engage leads via Facebook, WhatsApp, and automate review requests.

- Unified inbox for social media DMs
- WhatsApp and Messenger auto-responders
- Embedding Webchat on your site
- Review generation system (Google, BBB, Zillow)
- Automating positive review collection





- Social CRM Manager
- Reputation & Review Specialist
- Webchat Integration Expert
- Messenger Automation Assistant
- Unified Inbox Operator
- Customer Experience Optimizer



# Module 5: Lead Generation, Freelancing & Marketplace

#### Overview:

Learn how to start freelancing, offer CRM services, and grow your income.

### **Key Topics:**

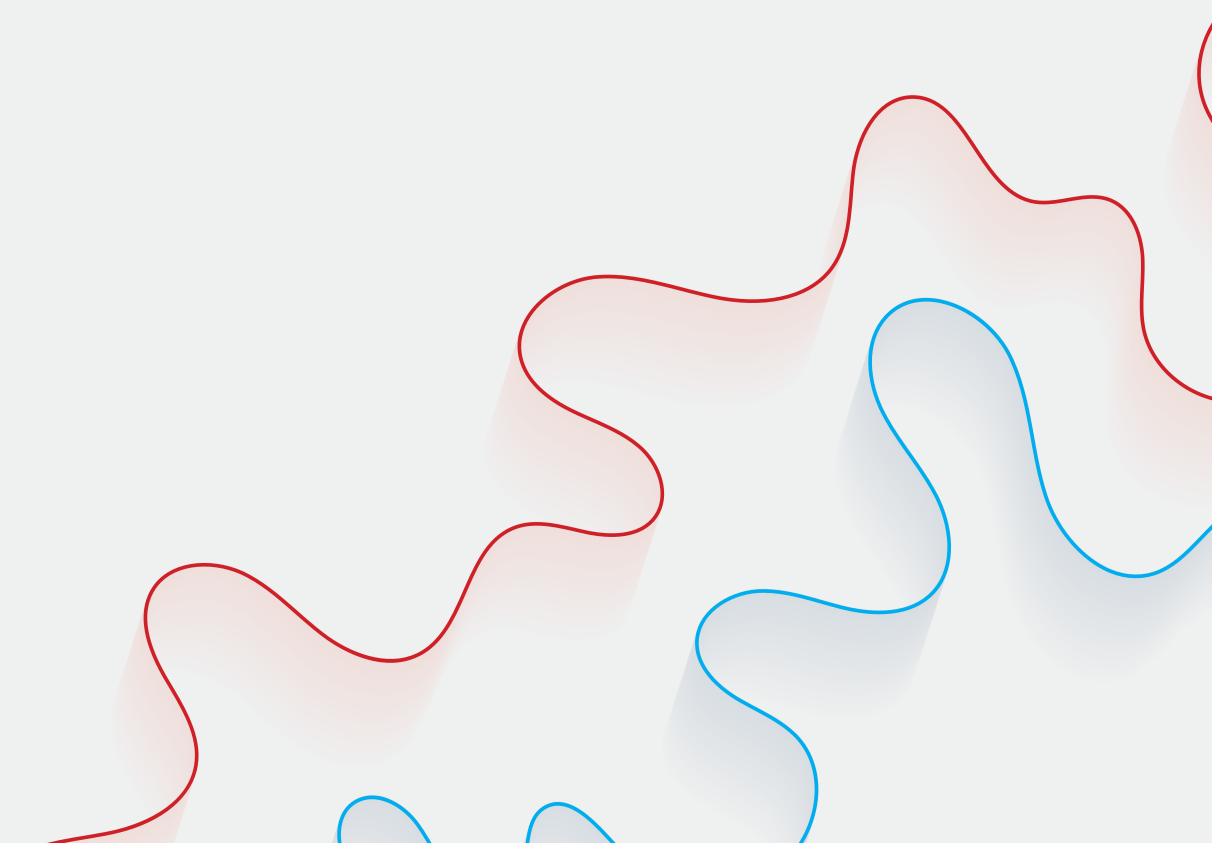
- Setting up profiles on Fiverr, Upwork
- Packaging & pricing your CRM services
- Creating your portfolio using The BigBot
- Client onboarding with custom forms
- Lifetime access to IDT support group

#### **Bonus:**

Live case study of a viral social media campaign.



- Freelance CRM Consultant
- Remote Automation Service Provider
- Agency CRM Partner
- Client Onboarding Specialist
- Profile & Proposal Writer
- Digital Systems Freelancer



# Final Project & Certification

#### In the final month, students will:

- Build a fully functional CRM setup for a business type (e.g., real estate, dental, coaching)
- Present a live demo to your instructor
- Get portfolio feedback and freelancing guidance

#### Upon completion, students will receive:

- Certificate of Completion from IDT.
- Access to the **IDT Group** for continuous growth & support.



# Frequently Asked Questions

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#### Do I need to bring my own laptop?

Yes, it is essential to bring your personal laptop as the institute does not provide PCs.



# Will I get access to The BigBot during the course?

Yes. Students will use The BigBot CRM in class and for their final project.



#### What do I need to bring?

Bring your own laptop for practical assignments and CRM configuration.



#### Do I need technical skills to join?

No. This course is beginner-friendly and suitable for marketers, assistants, and business owners.



#### Is this an in-person or online course?

All sessions are conducted physically at our IDT Okara campus.



#### Will I get a certificate?

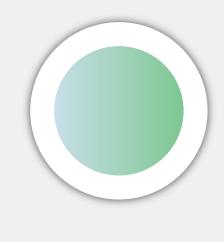
Yes. Upon completing the course and final project, you will receive an official certificate from IDT.



# Digital Marketing & Automation









APPLY NOW!