

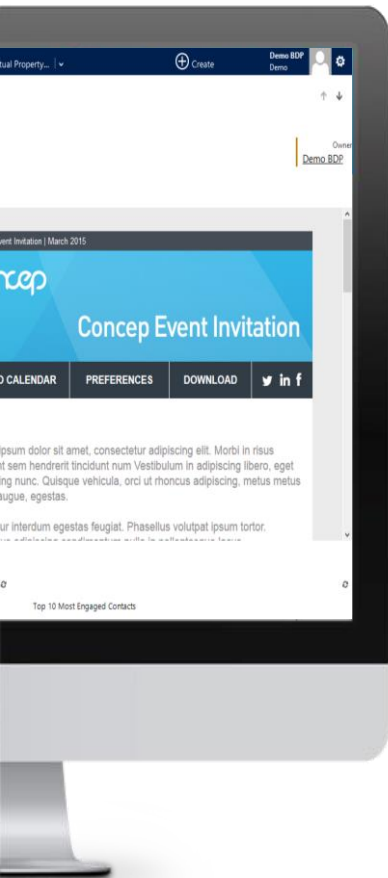


# Concept Send and Microsoft Dynamics CRM Integration

May 2016



**Flexible, scalable and intuitive** email marketing platform inside Microsoft Dynamics CRM with extensive B2B and corporate orientated functionality



 SEAMLESS INTEGRATION

 ENGAGEMENT SCORING

 ACTIONABLE DATA

 ANALYTICS & REPORTING

 EVENT WORKFLOWS



## WHY CONCEP?

### EASY TO USE

No technical knowledge required Rollout to users of any skill level

### SECURE

Cloud-based solution on AWS, designed for enterprise level security requirements – ISO27001 Certified

### DELIVERABILITY

Leading B2B deliverability and domain reputation management

### DECENTRALIZE

Distribute access to regions and divisions, yet control and configure centrally – lock down features for 'lite' users

### RAPID USER ADOPTION

Easy to roll-out and support users

### BRAND CONTROL

Control brand across all campaigns via templates and workflows

### REDUCE RISK

Comply with global data and privacy laws. Platform-wide control and enforcement of privacy features, or adjust per region or division

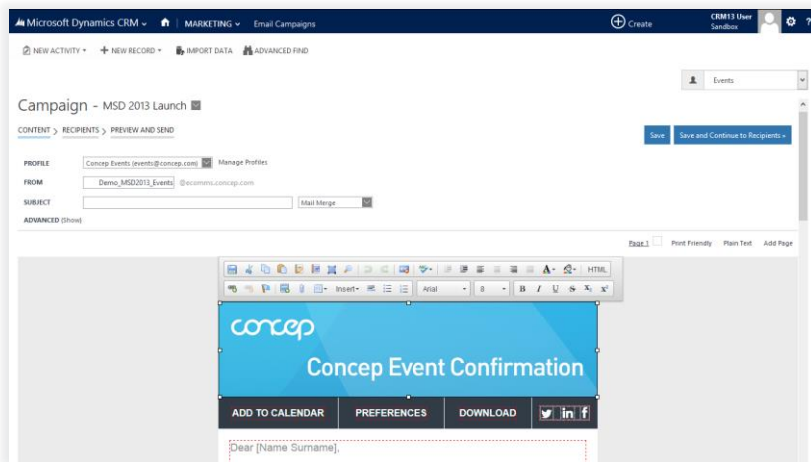
### DEDICATED ACCOUNT MANAGER

Highly professional with extensive technology expertise and marketing knowledge - consultative approach, aligned to your goals

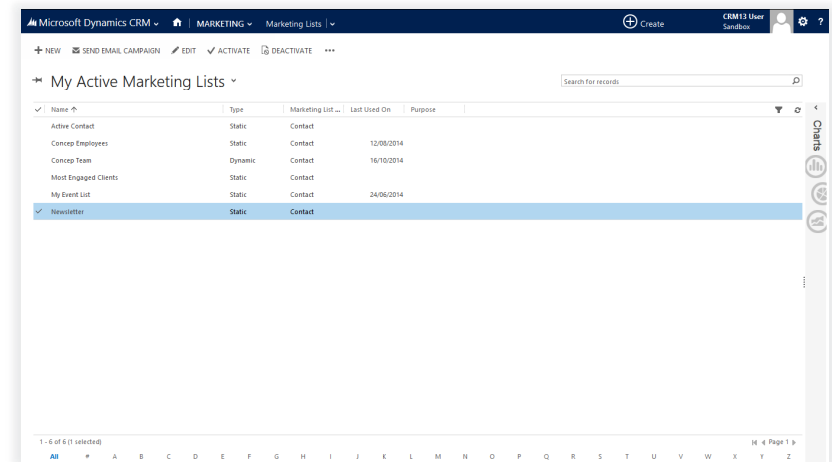


## More time

Less time of your team wasted on back and forth process in different systems and exporting and importing marketing lists.



- Create/upload the template
- Set up your account
- Test the campaign

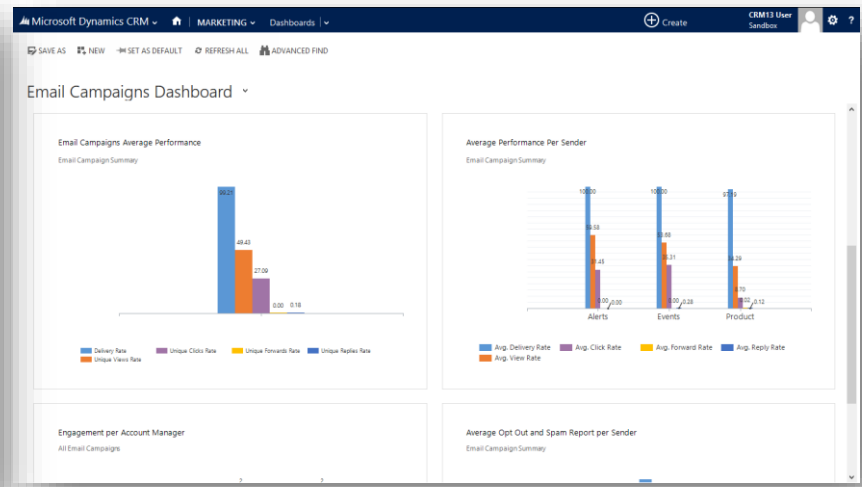
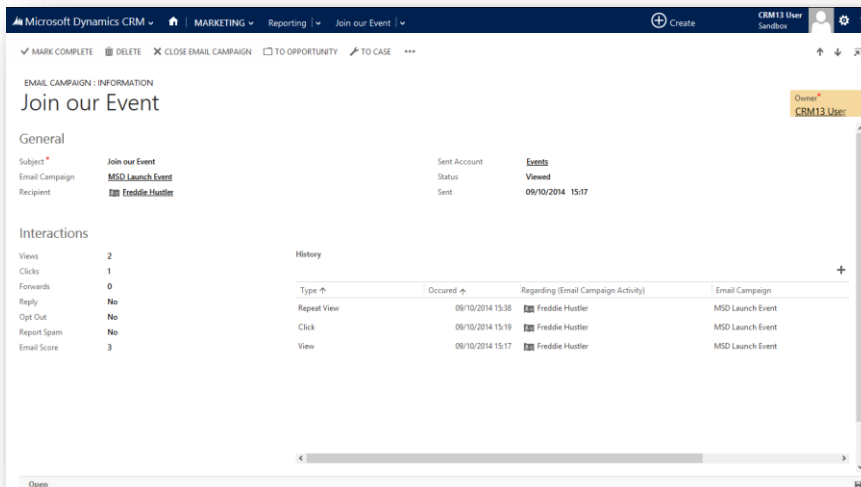


- Select a the recipients from marketing list or by selecting contacts/leads in your CRM.
- Define the day and time the campaign should be sent.



## More Knowledge

All your email campaign activities logged in your CRM database and connected to your contacts and leads.

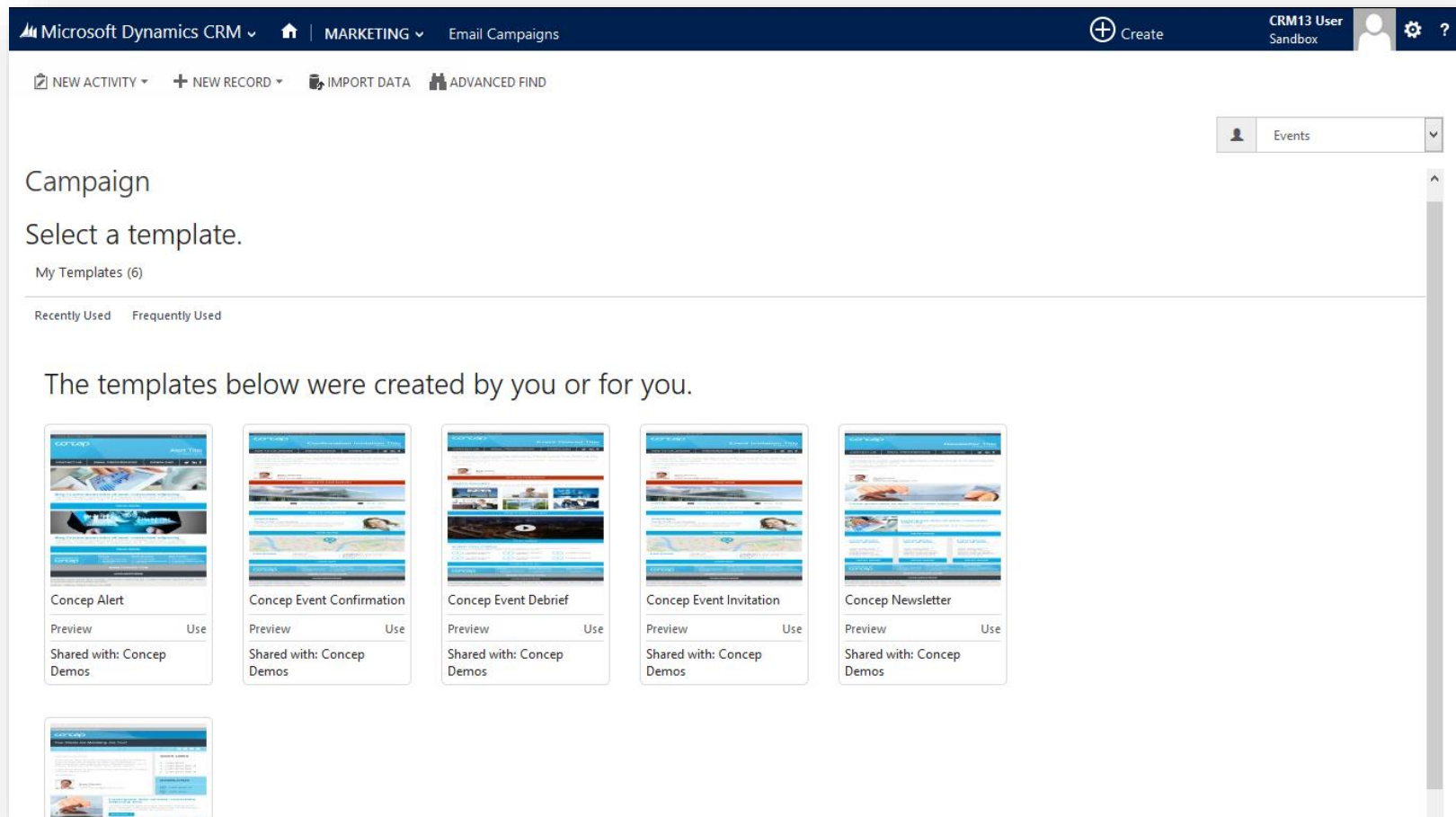


- Every time your contact/lead is included in a campaign an email campaign activity is created to him/her.
- Have all campaigns sent to your contacts in their activities list.
- Quickly visualize your contact interactions with your campaigns.

- Create your own charts/dashboards using your email campaign results.
- Target your contacts/leads by using previous campaigns interactions.
- Create workflows based on contacts/leads campaign interactions.

## Creating an Email Campaign

Email authoring directly within your Microsoft Dynamics environment.



The screenshot displays the Microsoft Dynamics CRM interface for creating an email campaign. The top navigation bar includes the Microsoft Dynamics CRM logo, a home icon, and the 'MARKETING' menu. The 'Email Campaigns' sub-menu is active. The right side of the header shows the user 'CRM13 User Sandbox' and a 'Create' button. Below the header, a toolbar contains options for 'NEW ACTIVITY', 'NEW RECORD', 'IMPORT DATA', and 'ADVANCED FIND'. A dropdown menu on the right is set to 'Events'. The main content area is titled 'Campaign' and prompts the user to 'Select a template.' Below this, it shows 'My Templates (6)' and tabs for 'Recently Used' and 'Frequently Used'. A message states, 'The templates below were created by you or for you.' Five email templates are displayed in a grid:

- Concep Alert**: Includes a preview and a 'Use' button. It is shared with 'Concep Demos'.
- Concep Event Confirmation**: Includes a preview and a 'Use' button. It is shared with 'Concep Demos'.
- Concep Event Debrief**: Includes a preview and a 'Use' button. It is shared with 'Concep Demos'.
- Concep Event Invitation**: Includes a preview and a 'Use' button. It is shared with 'Concep Demos'.
- Concep Newsletter**: Includes a preview and a 'Use' button. It is shared with 'Concep Demos'.

A sixth template is partially visible at the bottom left.



With Concep there's no need to code your own templates. Simple drag & drop content areas for seamless campaign editing.

The screenshot displays the Microsoft Dynamics CRM interface for managing Email Campaigns. The top navigation bar includes 'Microsoft Dynamics CRM', 'MARKETING', and 'Email Campaigns'. Below this, there are buttons for 'NEW ACTIVITY', 'NEW RECORD', and 'IMPORT DATA'. A red box highlights the 'Add Content' panel, which contains a 'Drag to add content' section with icons for 'Container', 'Content', 'Multi-Column', 'Image', and 'Spacer'. To the right, a message states 'Multi-Column block inserted.' Below the 'Add Content' panel, a preview of an email template titled 'Concep Event Invitation' is shown. The template features a blue header with the 'concep' logo and the title 'Concep Event Invitation'. Below the header is a navigation bar with links for 'WEBSITE', 'PREFERENCES', 'CONTACT', and social media icons for Twitter, LinkedIn, and Facebook. The main body of the email is titled 'Event Title' and contains two columns of dummy text. A red box highlights a 'Drag to Sort' toolbar with icons for undo, redo, bold, italic, link, unlink, and list. The text in the email body is a placeholder: 'This is dummy text. It is only a sample. The text is able to be read but has no meaning. As a simulation of actual copy, this sample uses ordinary words with normal frequencies. It will not deceive the eye.' The text is repeated in two columns.

## Audience Targeting

Define the recipients of your email campaign by picking one of your existing Marketing Lists...

Microsoft Dynamics CRM | MARKETING | Marketing Lists

Buttons: + NEW, **SEND EMAIL CAMPAIGN**, EDIT, ACTIVATE, DEACTIVATE, ...

My Active Marketing Lists

✓	Name ↑	Type	Marketing List ...	Last Used On	Purpose
	Active Contact	Static	Contact		
	Concep Employees	Static	Contact	12/08/2014	
	Concep Team	Dynamic	Contact	16/10/2014	
	Most Engaged Clients	Static	Contact		
	My Event List	Static	Contact	24/06/2014	
✓	Newsletter	Static	Contact		

1 - 6 of 6 (1 selected) | Page 1

Navigation: All, #, A, B, C, D, E, F, G, H, I, J, K, L, M, N, O, P, Q, R, S, T, U, V, W, X, Y, Z



## Audience Targeting

...or by picking one or more of your contacts.

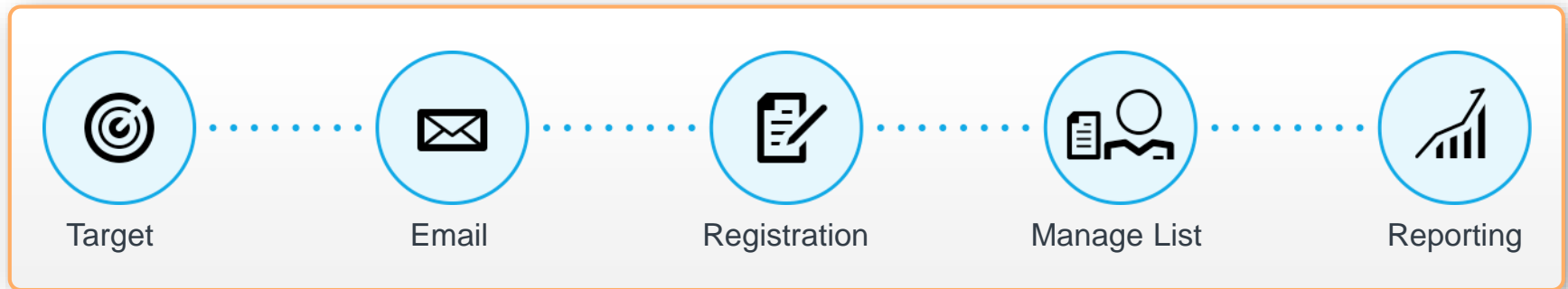
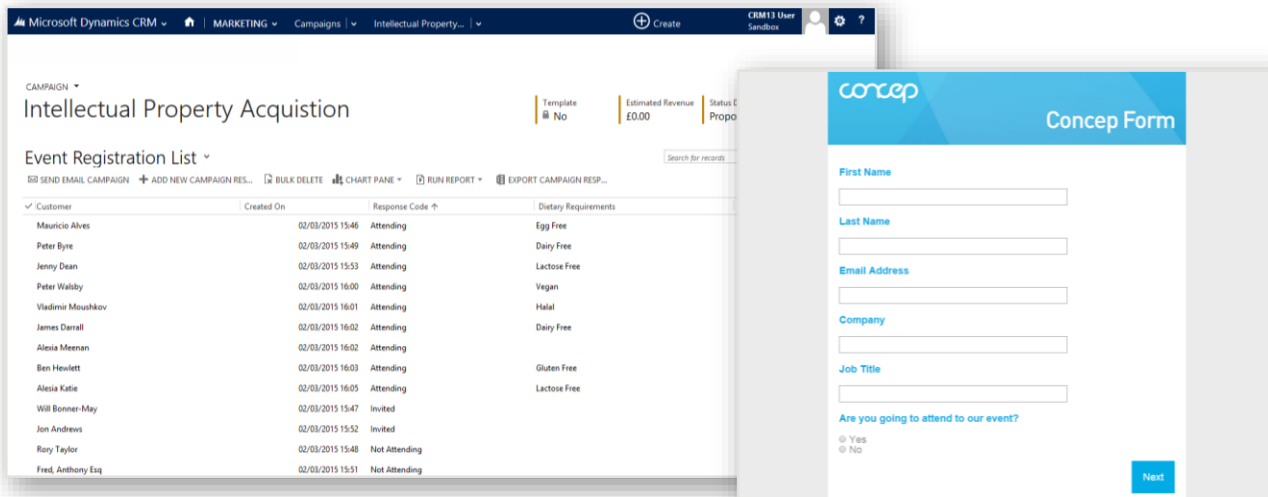
The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes 'Microsoft Dynamics CRM', 'MARKETING', and 'Contacts'. The 'SEND EMAIL CAMPAIGN' button is highlighted in the toolbar. Below the toolbar, the 'My Active Contacts' section displays a list of contacts. The following table represents the data visible in the screenshot:

Full Name	Email	Company Name	Business Phone
Abraham Cratch	abraham.cratch@exampl...		
<input checked="" type="checkbox"/> Addison Skinner	blandit.viverra@sitametm...		(024) 9203 1925
Adelle Schantini	adelle.schantini@exampl...		
Adolph Cunningham	adolph.cunningham@ex...		
<input checked="" type="checkbox"/> Adrian Farley	consectetur.cursus.et@...		(01663) 25857
Ahmad Alsaqri	ahmad.alsaqri@example...		
Alaine Raterman	alaine.raterman@exampl...		
Alayna Hoyal	alayna.hoyal@example.c...		
Alba Mosseri	alba.mosseri@example.c...		
<input checked="" type="checkbox"/> Aleisha Lemm	aleisha.lemm@example.c...		
Aleshia Tomkiewicz	aleshia.tomkiewicz@exa...	Example Co.	
Alesia Katie	alesia.katie@example.com		
<input checked="" type="checkbox"/> Aleta Ligons	aleta.ligons@example.com		
Alethea Mould	alethea.mould@example...	Example Co.	
Alexia Meenan	alexia.meenan@example...		
Ali1 Hamadi1	ali.hamadi@C0ncep.com1		
Ali10 Hamadi10	ali.hamadi@C0ncep.com10		
Ali100 Hamadi100	ali.hamadi@C0ncep.com...		

The bottom of the interface shows a status bar indicating '1 - 50 of 5000+ (4 selected)' and a navigation bar with letters A through Z.

## Event Workflow

The power of Microsoft Dynamics CRM and Concep Send improving your event management.

The screenshot displays the Microsoft Dynamics CRM interface for an event registration list. The main window shows the 'Intellectual Property Acquisition' campaign with a table of registrants. A 'Concep Form' overlay is visible in the foreground, allowing for data entry.

Customer	Created On	Response Code	Dietary Requirements
Mauricio Alves	02/03/2015 15:46	Attending	Egg Free
Peter Byre	02/03/2015 15:49	Attending	Dairy Free
Jenny Dean	02/03/2015 15:53	Attending	Lactose Free
Peter Walsby	02/03/2015 16:00	Attending	Vegan
Vladimir Moushkov	02/03/2015 16:01	Attending	Halal
James Derrall	02/03/2015 16:02	Attending	Dairy Free
Alesia Meenan	02/03/2015 16:02	Attending	
Ben Hewlett	02/03/2015 16:03	Attending	Gluten Free
Alesia Katie	02/03/2015 16:05	Attending	Lactose Free
Will Bonner-May	02/03/2015 15:47	Invited	
Jon Andrews	02/03/2015 15:52	Invited	
Rory Taylor	02/03/2015 15:48	Not Attending	
Fred, Anthony Esq	02/03/2015 15:51	Not Attending	

**Concep Form**

First Name

Last Name

Email Address

Company

Job Title

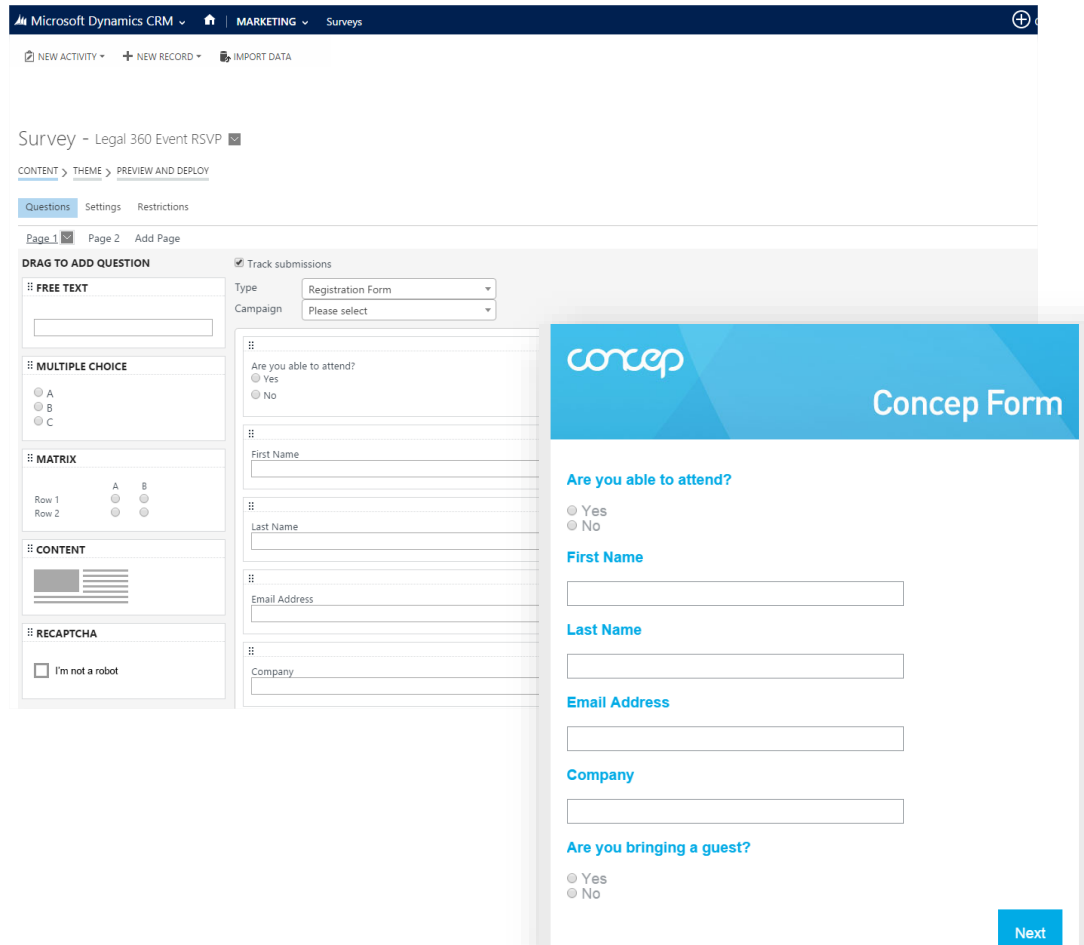
Are you going to attend to our event?

☐ Yes

☐ No

## Registration Surveys

- Full survey / data capture functionality
- Multiple question types
- Auto triggered campaigns based on response
- Data fields mapped into Microsoft Dynamics CRM Pre-population of fields
- Seamless transition



The image shows the Microsoft Dynamics CRM interface for creating and previewing a survey. The top navigation bar includes 'Microsoft Dynamics CRM', 'MARKETING', and 'Surveys'. Below this, there are tabs for 'NEW ACTIVITY', '+ NEW RECORD', and 'IMPORT DATA'. The main content area is titled 'Survey - Legal 360 Event RSVP' and has sub-tabs for 'CONTENT', 'THEME', and 'PREVIEW AND DEPLOY'. The 'CONTENT' tab is active, showing a 'DRAG TO ADD QUESTION' panel on the left with options like 'FREE TEXT', 'MULTIPLE CHOICE', 'MATRIX', 'CONTENT', and 'RECAPTCHA'. The main area shows a preview of the survey form with fields for 'Are you able to attend?', 'First Name', 'Last Name', 'Email Address', 'Company', and 'Are you bringing a guest?'. A 'Next' button is visible at the bottom right of the preview form.

Microsoft Dynamics CRM | MARKETING | Surveys

NEW ACTIVITY | + NEW RECORD | IMPORT DATA

Survey - Legal 360 Event RSVP

CONTENT | THEME | PREVIEW AND DEPLOY

Questions | Settings | Restrictions

Page 1 | Page 2 | Add Page

DRAG TO ADD QUESTION

Track submissions

Type: Registration Form

Campaign: Please select

Are you able to attend?

Yes

No

First Name

Last Name

Email Address

Company

Are you bringing a guest?

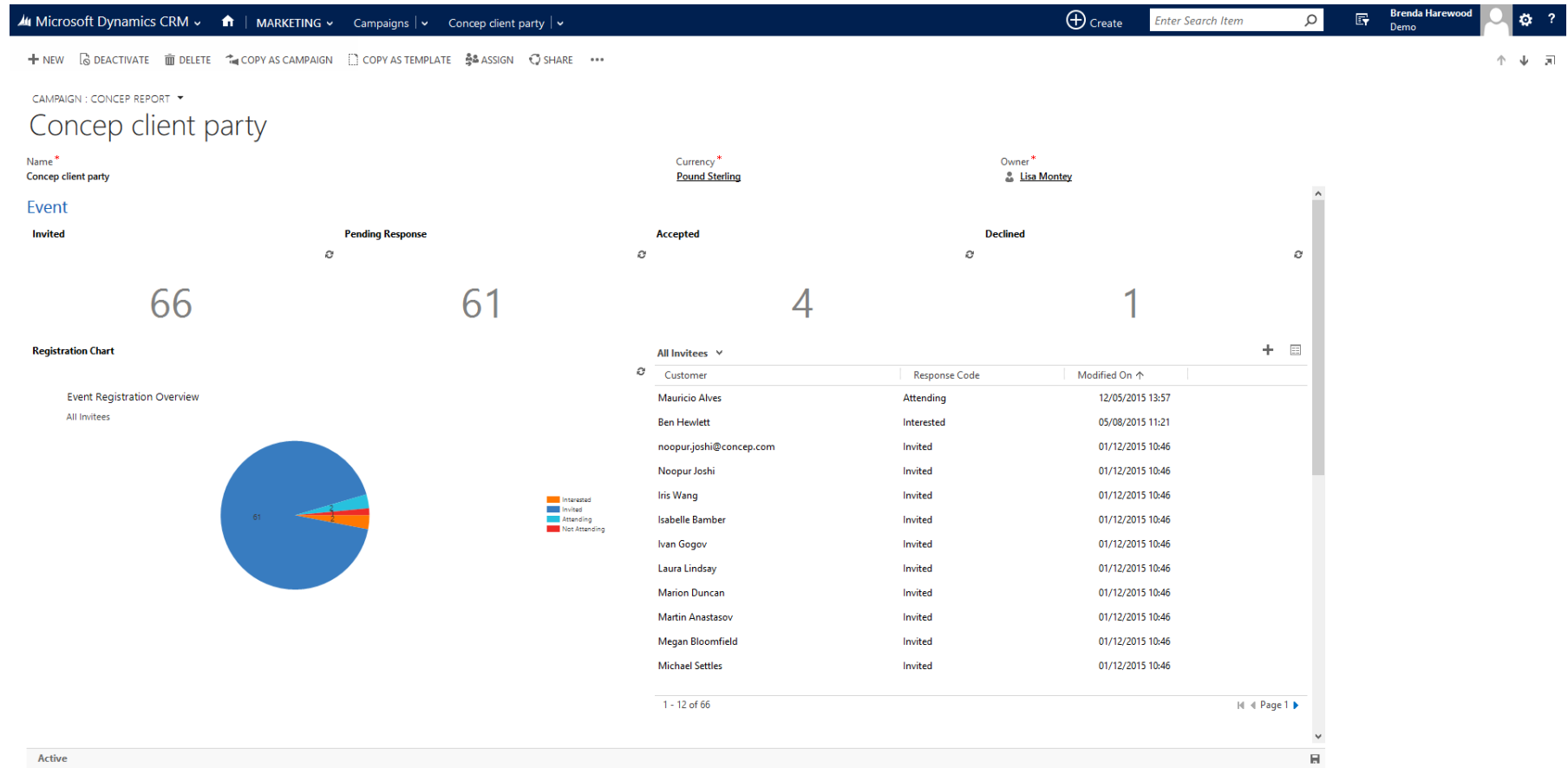
Yes

No

Next

## Event Dashboards

View the Event Reporting through Dashboards within Microsoft Dynamics CRM



## Audience Targeting

...or by picking one or more of your contacts.

Microsoft Dynamics CRM | MARKETING | Contacts

NEW **SEND EMAIL CAMPAIGN** EDIT ACTIVATE DEACTIVATE ...

My Active Contacts

Search for records

Full Name ↑	Email	Company Name	Business Phone
Abraham Cratch	abraham.cratch@exampl...		
<input checked="" type="checkbox"/> Addison Skinner	blandit.viverra@sitametm...		(024) 9203 1925
Adelle Schantini	adelle.schantini@exampl...		
Adolph Cunningham	adolph.cunningham@ex...		
<input checked="" type="checkbox"/> Adrian Farley	consectetur.cursus.et@...		(01663) 25857
Ahmad Alsaqri	ahmad.alsaqri@example...		
Alaine Raterman	alaine.raterman@exampl...		
Alayna Hoyal	alayna.hoyal@example.c...		
Alba Mosseri	alba.mosseri@example.c...		
<input checked="" type="checkbox"/> Aleisha Lemm	aleisha.lemm@example.c...		
Aleshia Tomkiewicz	aleshia.tomkiewicz@exa...	Example Co.	
Alesia Katie	alesia.katie@example.com		
<input checked="" type="checkbox"/> Aleta Ligons	aleta.ligons@example.com		
Alethea Mould	alethea.mould@example...	Example Co.	
Alexia Meenan	alexia.meenan@example...		
Ali1 Hamadi1	ali.hamadi@C0ncep.com1		
Ali10 Hamadi10	ali.hamadi@C0ncep.com10		
Ali100 Hamadi100	ali.hamadi@C0ncep.com...		

1 - 50 of 5000+ (4 selected)

Page 1

## Analysing the Results in Dynamics

View your email campaign results inside Microsoft Dynamics

Microsoft Dynamics CRM | MARKETING | Analytics

NEW | DELETE | EMAIL A LINK | RUN REPORT | EXPORT TO EXCEL | IMPORT DATA | CHART PANE

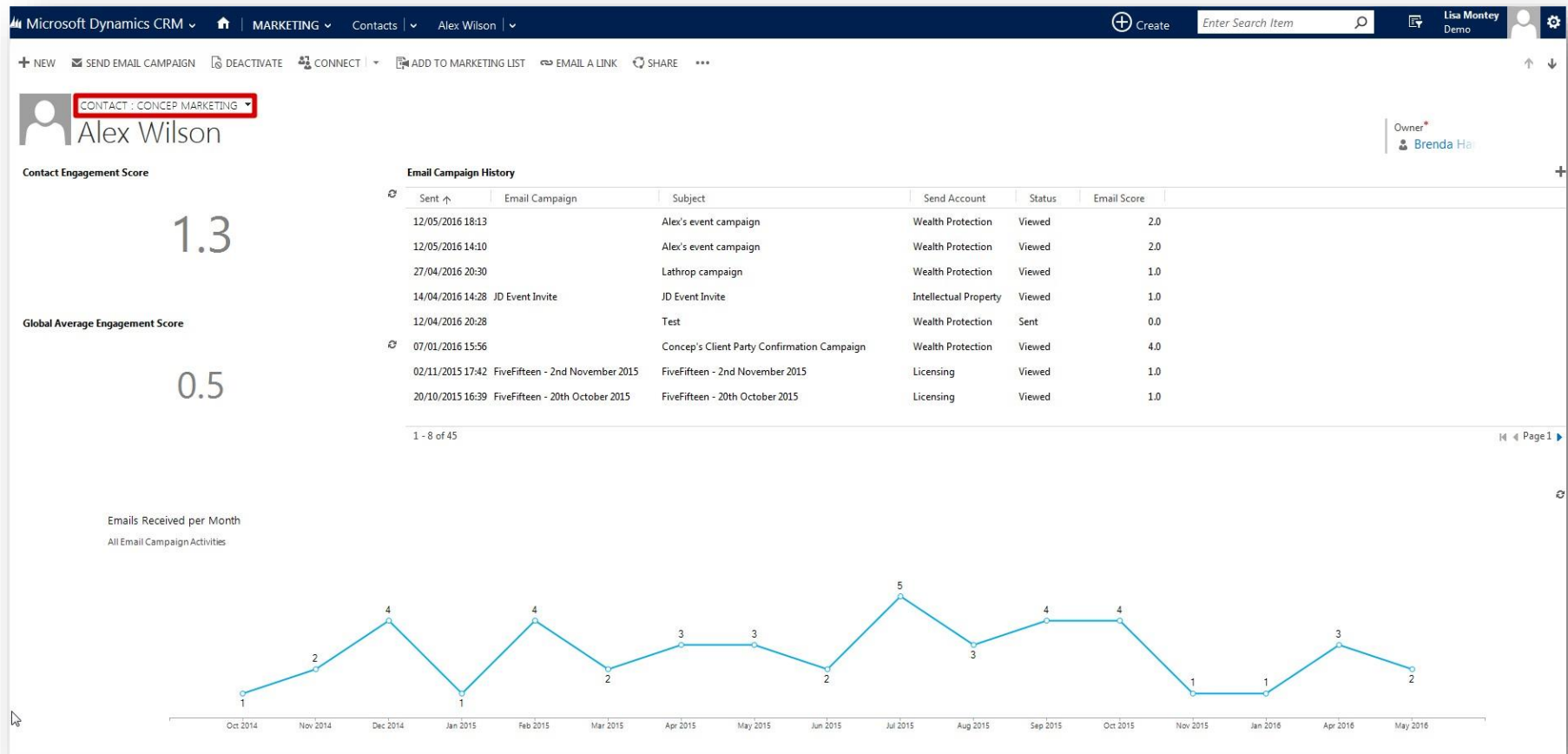
All Email Campaign Interactions

Search for records

Type	Occurred	Regarding (Email Campaign Activity)	Email Campaign	Sent Date (Email Campaign)
View	05/10/2012 11:29	Rob Hazelton	Auto Alert Initial Pull	05/11/2012 11:29
View	05/10/2012 11:29	Will Bonner-May	Auto Alert Initial Pull	05/11/2012 11:29
Click	05/10/2012 11:29	Sophie Ireland	Auto Alert Initial Pull	05/11/2012 11:29
Repeat View	05/10/2012 11:29	Sophie Ireland	Auto Alert Initial Pull	05/11/2012 11:29
View	05/10/2012 11:29	Sophie Ireland	Auto Alert Initial Pull	05/11/2012 11:29
Repeat View	05/10/2012 11:29	Will Bonner-May	Auto Alert Initial Pull	05/11/2012 11:29
Repeat View	05/10/2012 11:29	Will Bonner-May	Auto Alert Initial Pull	05/11/2012 11:29
Click	05/10/2012 11:30	Sophie Ireland	Auto Alert Initial Pull	05/11/2012 11:29
Click	05/10/2012 11:31	Isabelle Bamber	Auto Alert Initial Pull	05/11/2012 11:29
Repeat View	05/10/2012 11:31	Isabelle Bamber	Auto Alert Initial Pull	05/11/2012 11:29
View	05/10/2012 11:31	Isabelle Bamber	Auto Alert Initial Pull	05/11/2012 11:29
Click	05/10/2012 11:32	Isabelle Bamber	Auto Alert Initial Pull	05/11/2012 11:29
Repeat View	05/10/2012 11:32	Rob Hazelton	Auto Alert Initial Pull	05/11/2012 11:29
Repeat View	05/10/2012 11:35	Rob Hazelton	Auto Alert Initial Pull	05/11/2012 11:29
Repeat View	05/10/2012 11:35	Rob Hazelton	Auto Alert Initial Pull	05/11/2012 11:29
View	05/10/2012 11:37	Moray Hickey	Auto Alert Initial Pull	05/11/2012 11:29
Repeat View	05/10/2012 11:37	Will Bonner-May	Auto Alert Initial Pull	05/11/2012 11:29
Repeat View	05/10/2012 11:37	Will Bonner-May	Auto Alert Initial Pull	05/11/2012 11:29
Repeat View	05/10/2012 11:40	Will Bonner-May	Auto Alert Initial Pull	05/11/2012 11:29
Repeat View	05/10/2012 11:40	Will Bonner-May	Auto Alert Initial Pull	05/11/2012 11:29
View	05/10/2012 11:41	Marion Duncan	Auto Alert Initial Pull	05/11/2012 11:29
View	05/10/2012 11:41	Amir Shirazi	Auto Alert Initial Pull	05/11/2012 11:29
View	05/10/2012 11:41	Freddie Hustler	Auto Alert Initial Pull	05/11/2012 11:29
Click	05/10/2012 11:41	Marion Duncan	Auto Alert Initial Pull	05/11/2012 11:29
Repeat View	05/10/2012 11:41	Amir Shirazi	Auto Alert Initial Pull	05/11/2012 11:29

## Analysing the Results in Dynamics

Analyse your contact or lead behaviour for every email campaign they have received.





## Analysing the Results in Dynamics

Keep track of your company's Email Campaign KPIs in Microsoft Dynamics.

