

Personalize customer experiences | August 2020

# Dynamics 365 Marketing



# Agenda



Market landscape

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Dynamics 365  
Marketing overview

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Application demo

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Try the application

# Businesses face complex business challenges

Disconnected tools  
and process



Blanket emails  
are not working



Customer data  
is scattered



Sellers ignore  
marketing leads



Security and  
compliance



No insights to  
improve results



# The market isn't delivering

## Market gaps

Data Siloes - Separate Sales, Marketing, Service systems

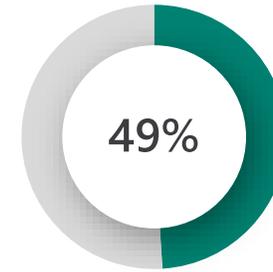
Unsynchronized view of leads and contacts

Stale leads

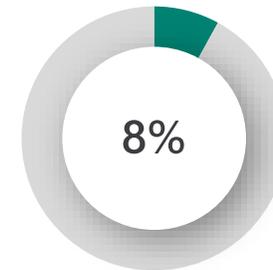
Higher TCO due to integration and maintenance costs

Lack of robust extensibility to support the needs of complex businesses

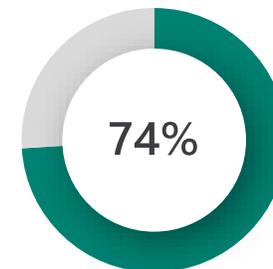
Lack E2E experience orchestration



49% of sales reps ignore more than half of marketing's leads<sup>1</sup>



Only 8% of B2B companies said they have tight alignment between their sales and marketing teams

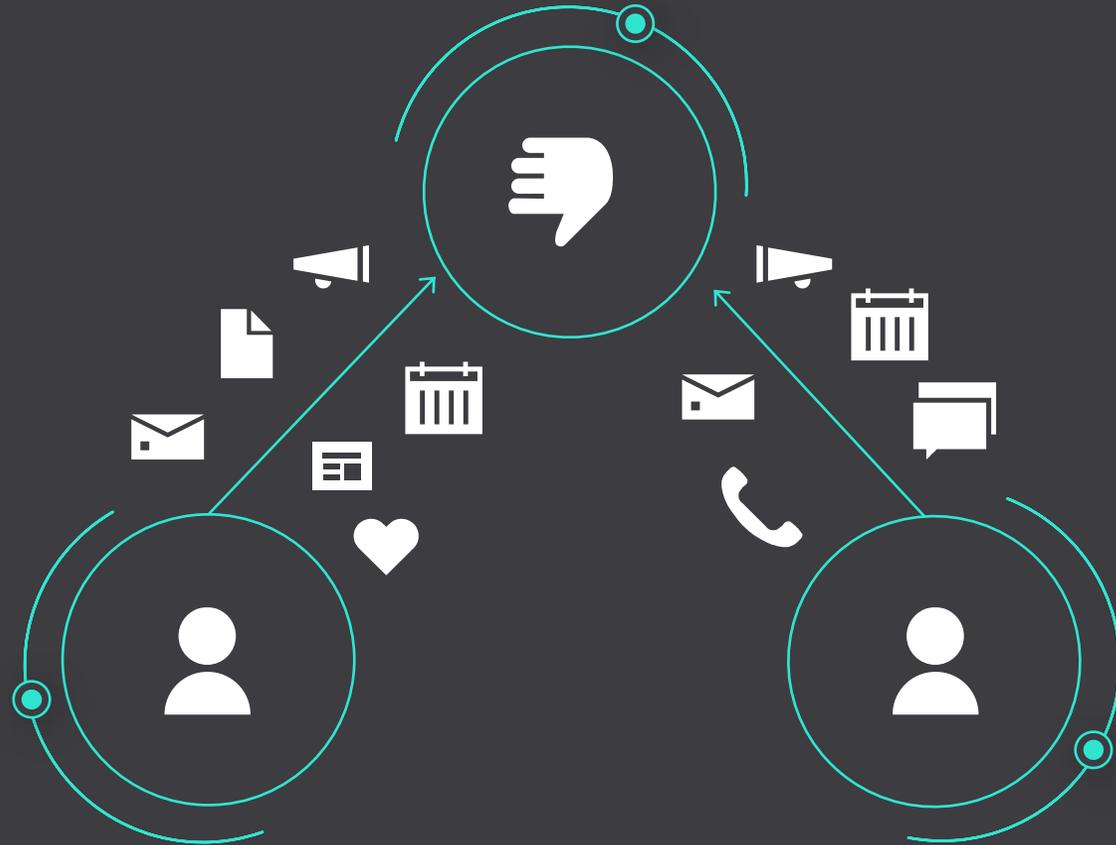


74% of business buyers conduct more than half of their research online before making an offline purchase

<sup>1</sup> [McKinsey](#)

# Problem

Companies want better results from Marketing and Sales, but siloed solutions and fragmented customer data are getting in the way of optimizing the customer experience to build lifelong advocates



# Our approach

A closer look at our current approach



An aerial photograph of a city, likely New York City, showing a mix of modern skyscrapers and older brick buildings. A dense network of teal lines connects small white square nodes across the entire image, creating a digital or data network overlay. The text is centered in the middle of the image.

**CUSTOMER DATA IS EVERYWHERE  
AND ITS CHANGING EVERYTHING**

# The digital feedback loop

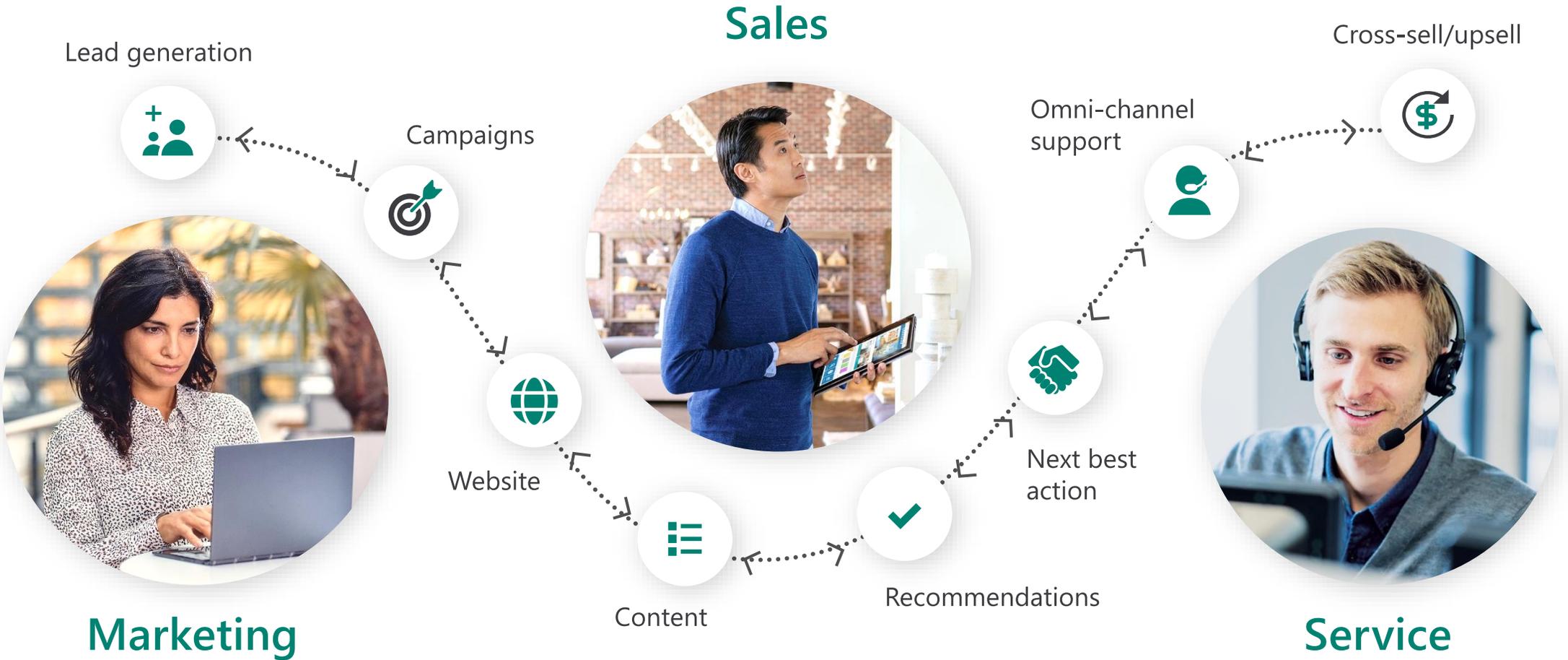
- 1 Data**  
Capture digital signal across business
- 2 Intelligence**  
Connect and synthesize data
- 3 Action**  
Improve business outcomes



# Leveraging collective strength of Microsoft



# Power end-to-end customer experiences



**Dynamics 365 Marketing**

**Personalize Buyer  
Experiences**

# New approach to creating personalized customer experiences

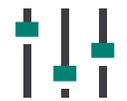
Dynamics 365 Marketing



Unify customer data to gain actionable personalized insights and increase demand



Orchestrate customer journeys across multiple channels



Align marketing and sales with same tools and process to manage leads



Make more informed decisions with AI and interactions insights



Grow operations with secure, trusted and compliant solution



# Unique value



Lives together with Dynamics 365 Sales on the same platform



Combination of marketing automation with events management, Customer Insights integration, connector to LinkedIn and AI based capabilities



Secure, trusted and compliant Microsoft Azure cloud



Scalable architecture that manages contact and interactions data separately



Easy to configure, use, and extend



"All this new technology and talk of customer journeys is foreign in this industry. And it requires a special solution to make automated campaigns work when every customer contact is so important and unique. That's why Dynamics 365 is the right tool—no other system is customizable and dependable enough to do all the things we need it to do."

**Keith Perfect**

Director of Technology and Intelligence  
Northrop & Johnson

# Premier yacht brokerage boosts sales by 70 percent with Dynamics 365

Northrop & Johnson, largest superyacht brokerage in the United States, caters to a small group of high-value clients with precision marketing and unmatched customer service.

Because relationships are at the center of its business, Northrop & Johnson knows every insight into its customers is invaluable. In an industry where technology hasn't been widely embraced, the company was able to use modern technology to create a strong competitive advantage.

Working with Dynamics 365, the company now has a central hub for all marketing, sales, and customer relationship activities. Since its deployment, the company reports a 70 per cent increase in charter sales.



#### Products and Services

Dynamics 365  
Customer Service  
Dynamics 365 Sales  
Adobe Marketing Cloud

#### Organization Size

18,000 employees

#### Industry

Retailer

#### Country

United States



# Dynamics 365 Marketing – customer stories



“With other marketing automation tools, we were only able to blast generic emails to prospects. With Dynamics 365 Marketing, it’s easy to treat people as individuals and craft highly targeted messages that support a very personal buying journey.”

Adrian Pask  
Vice President, Marketing  
Vorne Industries”



“We didn't adopt Dynamics 365 Marketing because we were focused on today. We did it because we are focused on tomorrow and beyond. It’s a flexible, expanding solution that will support and sustain our vision of creating meaningful customer relationships well into the future.”

Pascal Tourres  
Head of Group Digital Marketing  
DHI



“The leads that Marketing is generating today are much stronger than they used to be. Our colleagues in Sales were surprised by the capabilities of Dynamics 365 Marketing.”

Karel Beránek  
Dynamics 365 Product Owner,  
ACTUM Digital



“Seeing the amount of new business generated through our website after adding the Marketing app was a big eye opener, especially in our quite conservative industry. It explicitly shows the added value of the marketing department within the company.”

Rutger Bonsel  
General Manager of Marketing  
Broekman Logistics



# Dynamics 365 Marketing

## Feature summary



### Lead capabilities

#### Multi-channel campaigns

Email marketing with A/B testing and Send Now

Landing pages, forms and website personalization

Reusable content blocks and videos

LinkedIn and social integration

Marketing support for Business units

Marketing calendar

#### Lead nurturing

Customer journey designer and orchestration

Dynamics Customer Insights integration

Dynamic segmentation and multiple lead scoring

Account-based marketing

Lead lifecycle with automated business process flows

#### Event management

Events portal

Sessions, speaker, and venue management

Registration and attendance tracking

QR codes and wait listing

Webinars integration

#### Insights and reporting

360-degree view of leads and contacts

Customer Interactions insights

Surveys with Microsoft Forms Pro

Advanced and custom analytics with Power BI

#### Unified platform

Integration with content management systems

Sales integration and collaboration

Easier set up

Approvals with Microsoft Power Automate

Extensibility for campaigns and segments

#### AI capabilities

Automated scheduler

Spam score

# Simple marketing automation examples from our customers

## Customer journey with personalized Emails

- **Periodic newsletters and congratulatory emails** for key events such as birthdays and anniversaries
- **Notify sellers via emails or route leads** when there is web activity by target audience
- **Welcome emails and post sales nurture** for new customers with helpful links to manuals or how-to videos
- **Order notifications, product follow ups and product recommendations** maintain customer connection and drive repeat business

## Improved targeting and communications

- **Create target segments** based on unified data from different sources
- **Identify fans and best customers** based on product usage
- **Abandoned carts** are identified and gentle reminders to finish the purchase are sent to the customer
- **Re-Engagement** initiatives track customer engagement levels and take appropriate action

## Events

- **Annual customer events** to strengthen relationships
- **Volunteer events** to drive registrations and help during disaster relief or other key events
- **Product launches, discount and giveaway** events and announcements to spike sales

The screenshot displays the Dynamics 365 Marketing Designer interface for a customer journey titled "Customer Journey Title". The interface includes a top navigation bar with "Dynamics 365", "Marketing", and "Campaigns > New customer loyalt...". Below the navigation, there are tabs for "Save", "Save As", "Validate", "Run", and "CTA". The main area shows the "Designer" view with a flowchart of the customer journey. The flow starts with a "Segment" component labeled "Launch Marketing Campaign" (11K), which connects to a "Marketing Email" component labeled "Cognitive Invite Mailer". This email component connects to a "Scheduler" component labeled "Invitation Scheduler". The flow then branches into two paths: one leading to a "Segment" component labeled "Launch Marketing" (20K), which connects to a "Marketing Email" component labeled "Cognitive Mailer"; the other leading to a "Segment" component labeled "Marketing Campaign" (14K), which connects to a "Scheduler" component. A "Properties" panel on the right side of the interface lists various components such as "Content Type" (Email, Event, Su), "Actions" (Activity, Inv), "Targets" (Segment, Re), and "Flow Control" (Scheduler, Tr, Splitter, Sp). The status bar at the bottom indicates "Active".

# Demo

Dynamics 365 Marketing > Get started

Refresh

## Get started with Dynamics 365 Marketing

**Start with the basics**

- 1. Create engaging emails**  
Use templates to put together great-looking emails quickly and customize them with just a few easy clicks.  
[Design email](#)
- 2. Pinpoint your audience**  
Use the powerful segmentation engine to assemble just the right target audience for your campaigns.  
[Find segment](#)
- 3. Build a campaign**  
Create an interactive customer journey to engage your target audience and nurture your best prospects.  
[Create journey](#)

**Try these next**

- Build rich pages and forms >
- Set up an event with online registration >
- Create interactive customer journeys with triggers and signup >
- Set up automated lead generation and scoring >
- Generate activities from a customer journey >

**Did you know**

### Social posting

Reach out to contacts on social media by posting directly to your organization's pages on Twitter, Facebook, and LinkedIn.

[Learn more](#)

**Quota information**

- 57 of 110200 emails sent
- 3823 of 130000 contacts reached
- 1298 Litmus uses left

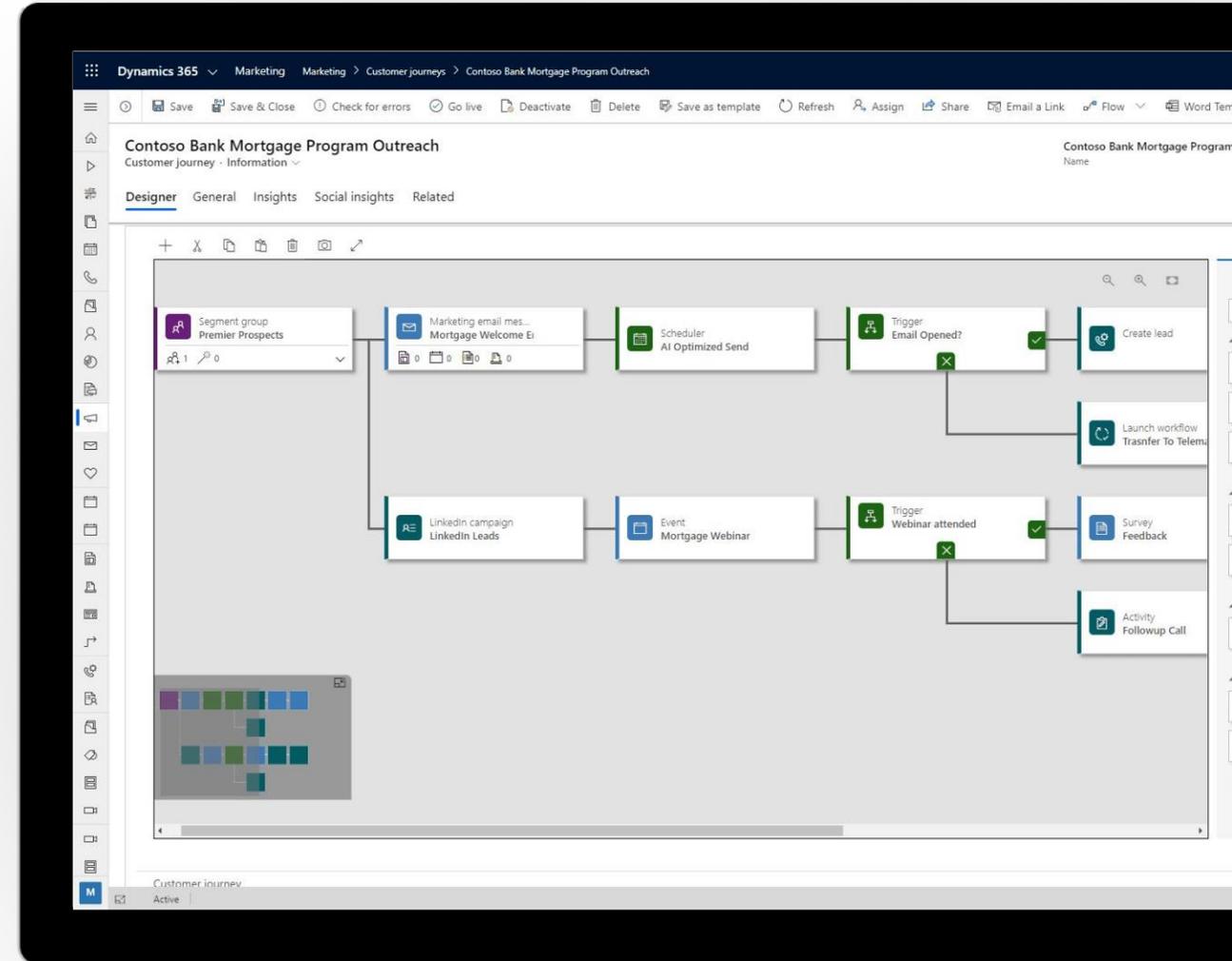
# Orchestrate customer journeys

System of activation on Customer Insights

Orchestrate customer journeys across the entire lifecycle

Create content quickly and without expertise

Target and personalize to attract the right prospects and improve engagement



# Align sales and marketing

Create a single view of prospects

Identify, target, and close top accounts

Track and prioritize leads

Increase productivity

Simplify collaboration

The screenshot displays the Microsoft Dynamics 365 Marketing interface for a lead named David Li. The interface is viewed on a tablet and shows a navigation bar at the top with options like Recycle, New, Delete, Refresh, Collaborate, Qualify, Process, Disqualify, Add to Marketing List, Assign, Share, Email a Link, and Follow. Below the navigation bar, the lead's name and profile picture are shown, along with a status indicator 'Lead-to-opportunity mar...' and 'Active for 3 months'. A progress bar at the top indicates the lead's journey through stages: Inquiry, Automated Marketing Qualification, Tele Prospecting Acceptance, and Tele Prospecting Qu. The main content area is divided into sections: Overview, Interactions timeline, and Lead progress over time. The Overview section shows 'Lead age in days' as 97. The Interactions timeline shows a sequence of events: Email delivered (8/13/2019 6:53 AM), Email sent (8/13/2019 6:53 AM), Website visited (7/18/2019 10:42 AM), Form submitted (7/18/2019 10:30 AM), and Website visited (7/18/2019 9:39 AM). The Lead progress over time section shows a progress bar and the number 125. The Windows taskbar is visible at the bottom of the screen.

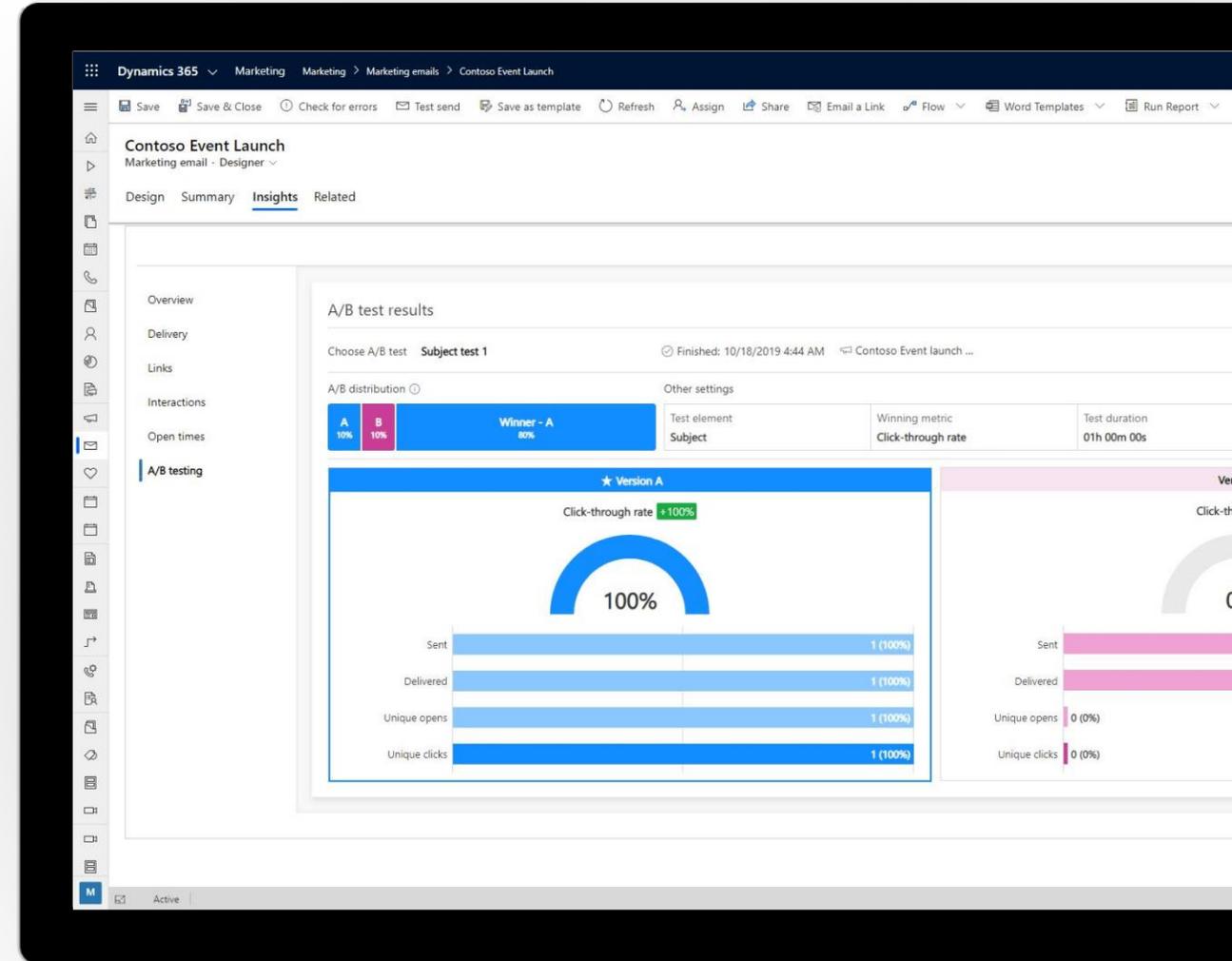
# Make informed decisions

Improve marketing effectiveness through understanding what is working and what is not.

Experiment and choose the right content.

Fill gaps in customer understanding using Forms Pro surveys directly from Dynamics 365 Marketing emails.

Let AI make the decision for you through automated scheduler, spam score, and automatic winner selection.



# Grow with an adaptable platform

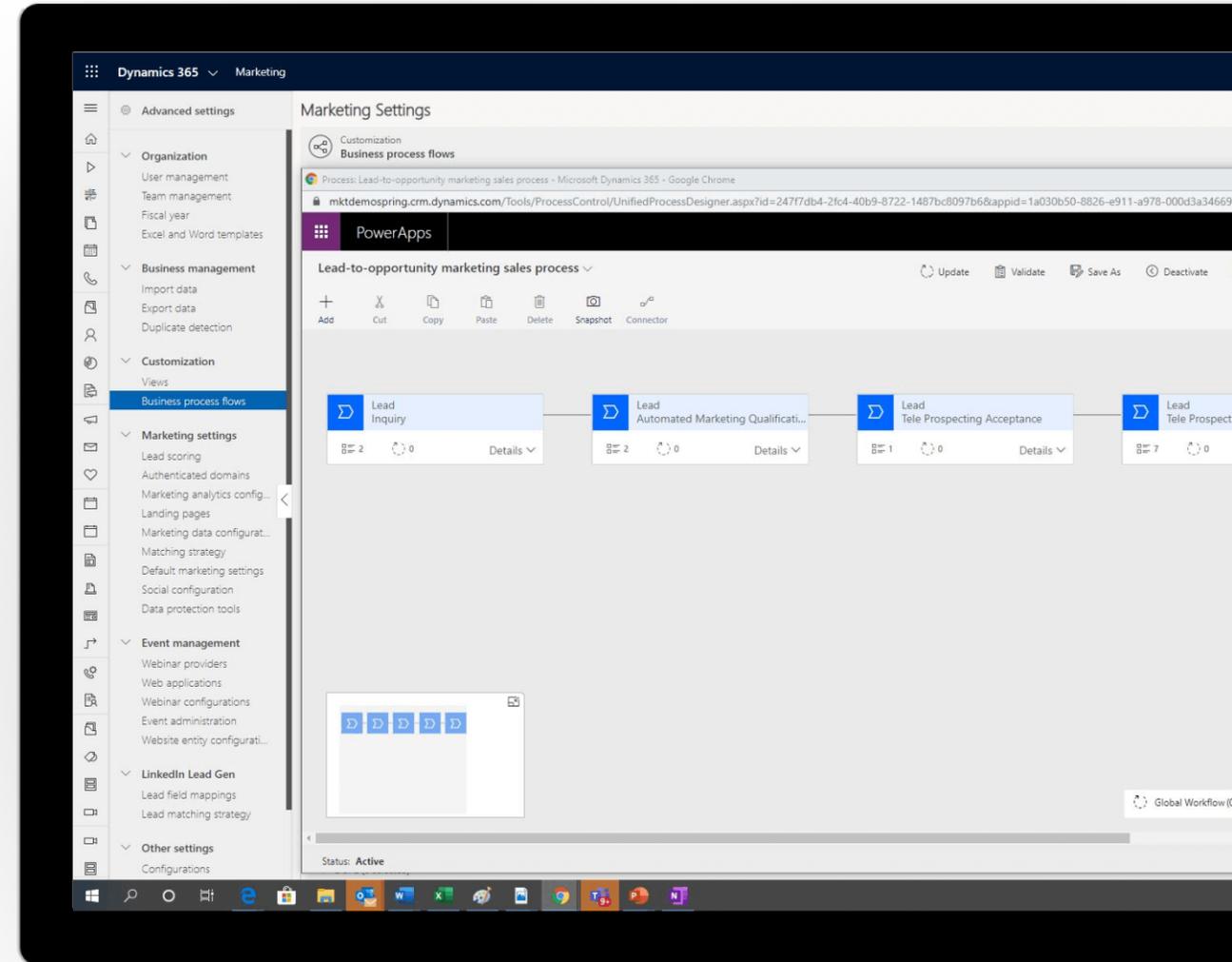
Adapt Marketing to your needs

Easily integrate data and business processes

Enhance journeys with custom channels and CDS APIs

Run business-unit-level marketing

Market globally while maintaining compliance



# Orchestrate Customer journeys

# Create campaign assets quickly

## With marketing automation features and Microsoft Power Automate

Dynamics 365 Marketing business features include:

- Configurable templates
- Reusable content blocks
- Design tools

Use Microsoft Power Automate to streamline content approvals and easily integrate with third-party management systems.

The screenshot displays the Dynamics 365 Marketing interface for creating a new customer journey. The main window shows a flowchart with the following steps: 1. Segment Group 'my customers', 2. Marketing Email Message 'event invitation', 3. Trigger 'registered?', 4. Scheduler 'wait until event', and 5. Trigger 'email opened?'. A 'Toolbox' on the right lists various components like Content, Actions, and Targets. An overlay dialog titled 'Select a customer journey template' is open, showing a table of templates and details for the selected 'Announcement' template.

Name	Status	Contacts
Announcement	SYSTEM	SYSTEM
Blank Template	SYSTEM	
CJ		Demo Marketing
Customer Onboarding	SYSTEM	
Event Marketing	SYSTEM	
High Touch Marketing	SYSTEM	
Monthly Newsletter	SYSTEM	
Simple Email Journey	SYSTEM	

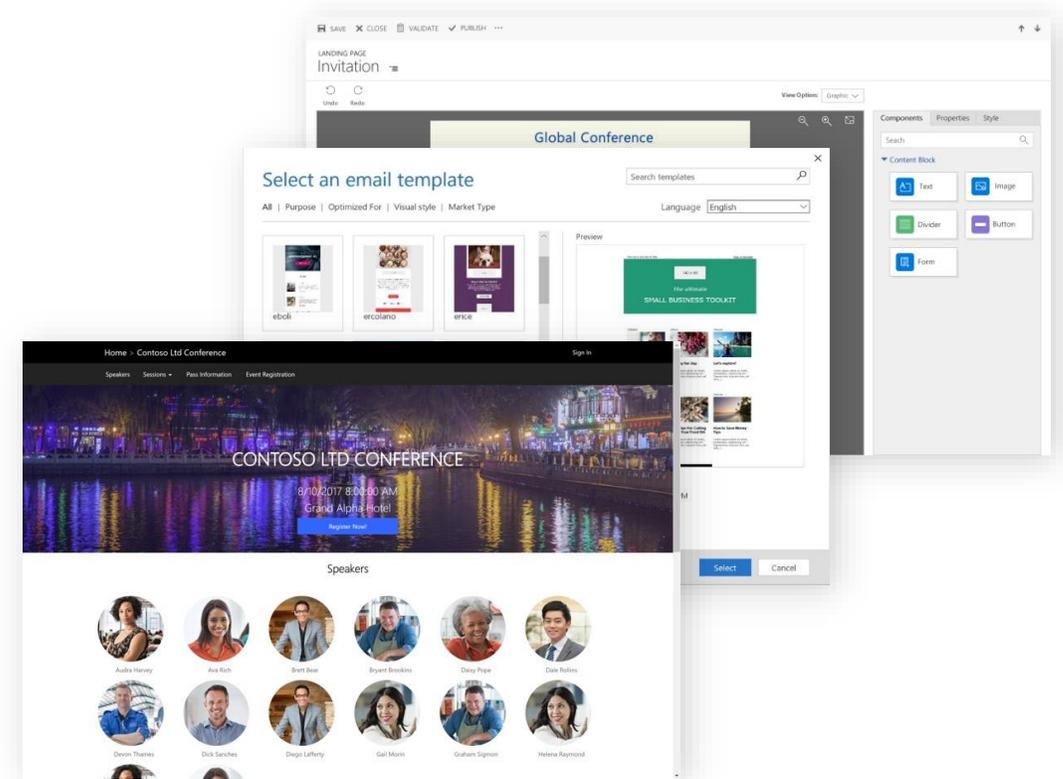
**Announcement**  
Created by: SYSTEM  
Last modified: 2/9/2018 5:24 PM  
Purpose: Announcement  
Recurring: No  
Description: Send an announcement to your customers with marketing links. Clickers are sent a follow up email and can be saved to a segment.

# Attract the right prospects

## Run targeted, multi-channel campaigns

Gain the advantage of marketing automation capabilities that include:

- Email marketing
- Web landing pages
- Events
- Telemarketing
- SMS integration
- LinkedIn integration
- Other custom channels



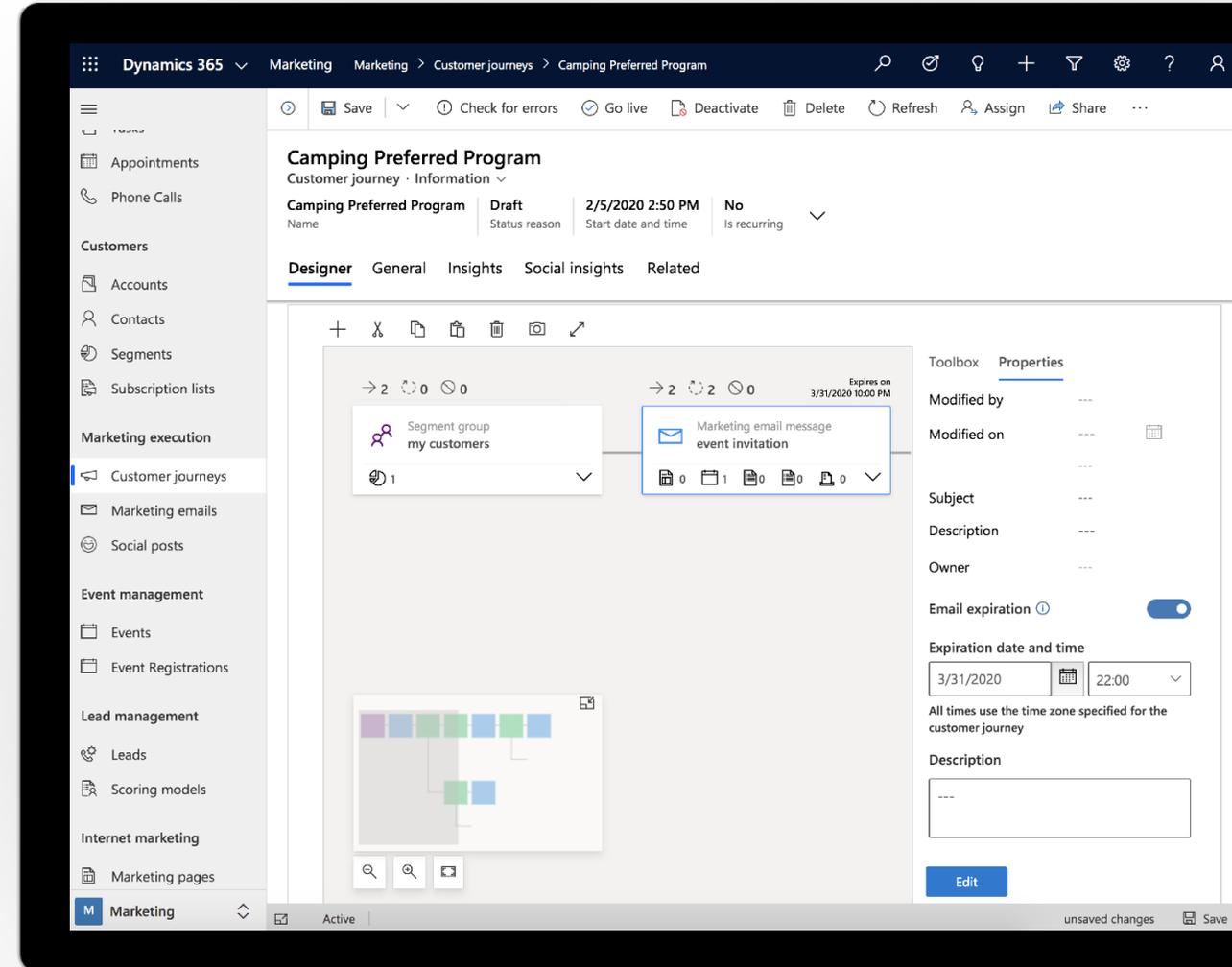
# Enhanced customer journey experience

## Know your customers

Use data on prospect buying behavior and preferences to engage with the right message at the right time in the right channel

Deliver messages triggered by business transactions such as purchases, returns, and payments

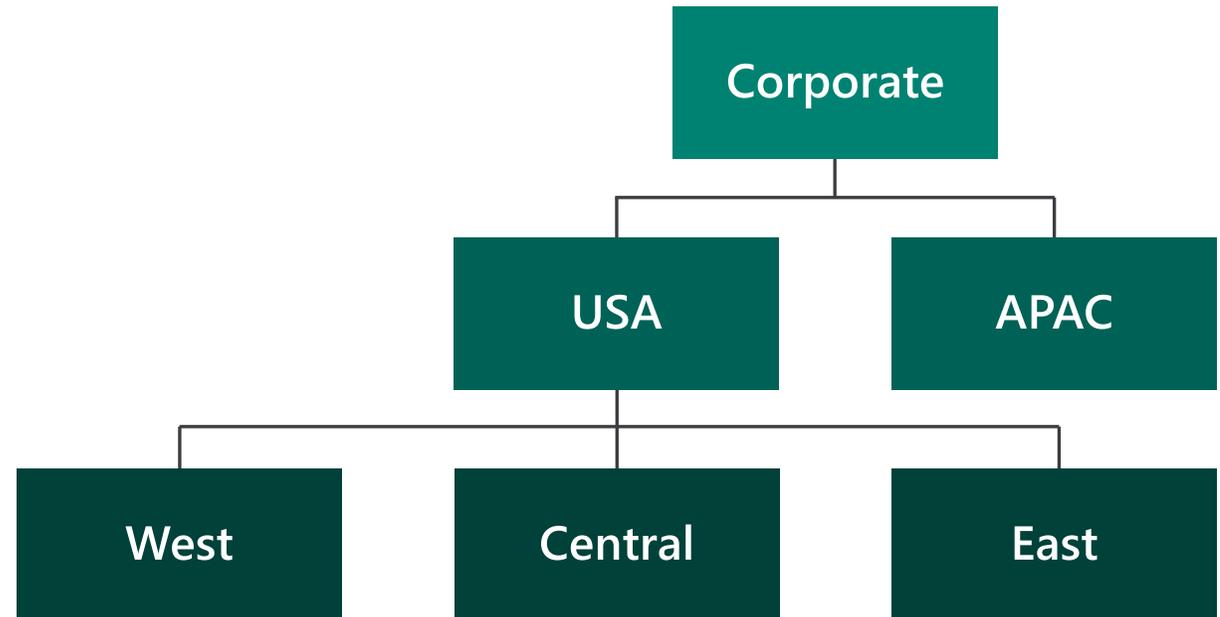
Control time-sensitive email messages and prevent sending outdated reminder messages



# Run business unit-level marketing

## Customization is easy

Address the different and distinct needs of companies structured around business units with reusable shared campaign content and custom audience targeting



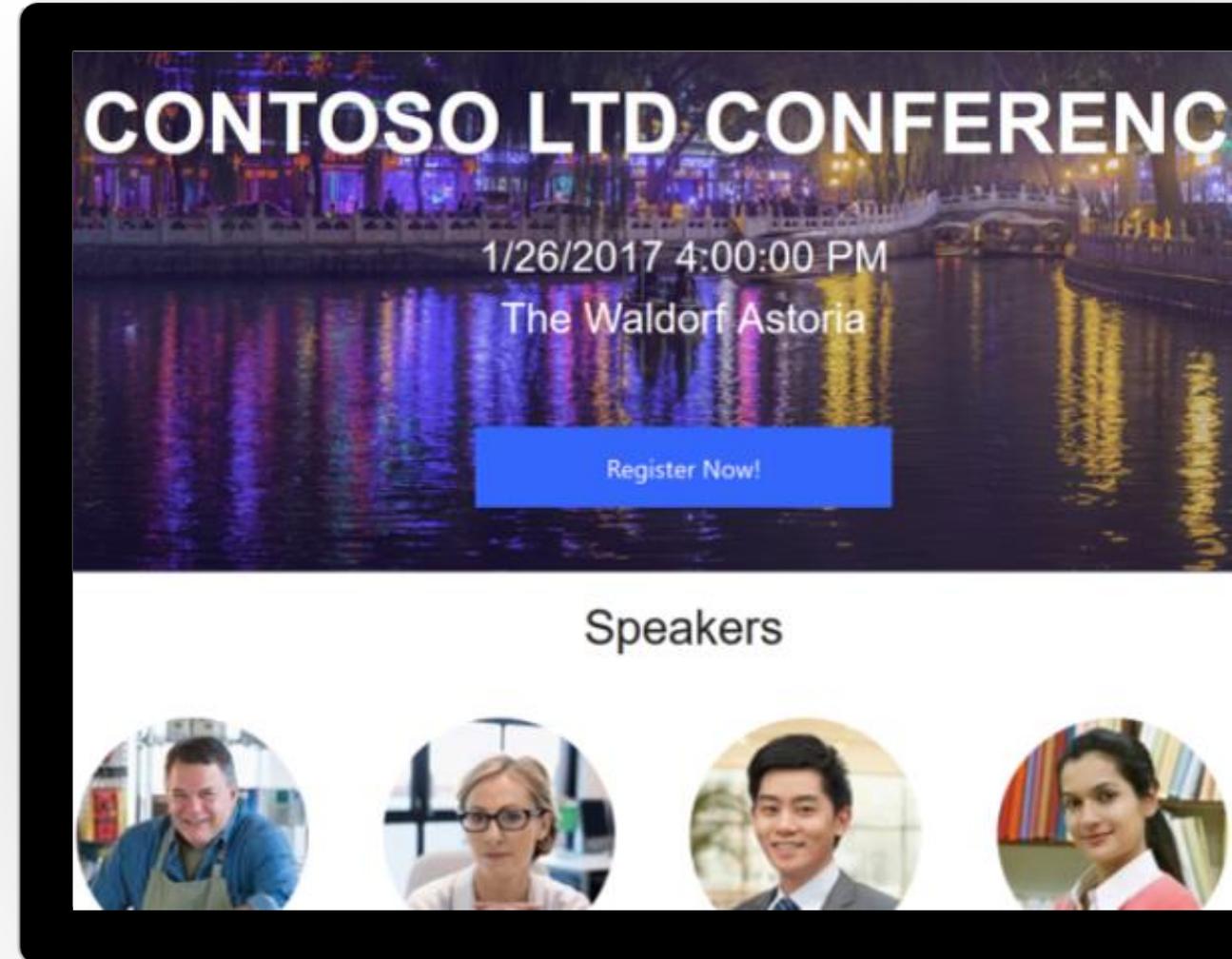
# Simplify event management

## Full set of organizing tools

Attendee-facing web portal and registration

Session, speaker, and logistics management capabilities

Integration with ON24 and other webinar providers



The screenshot displays a registration page for the 'CONTOSO LTD CONFERENCE'. The background features a night view of a waterfront with colorful lights reflecting on the water. The event details are as follows:

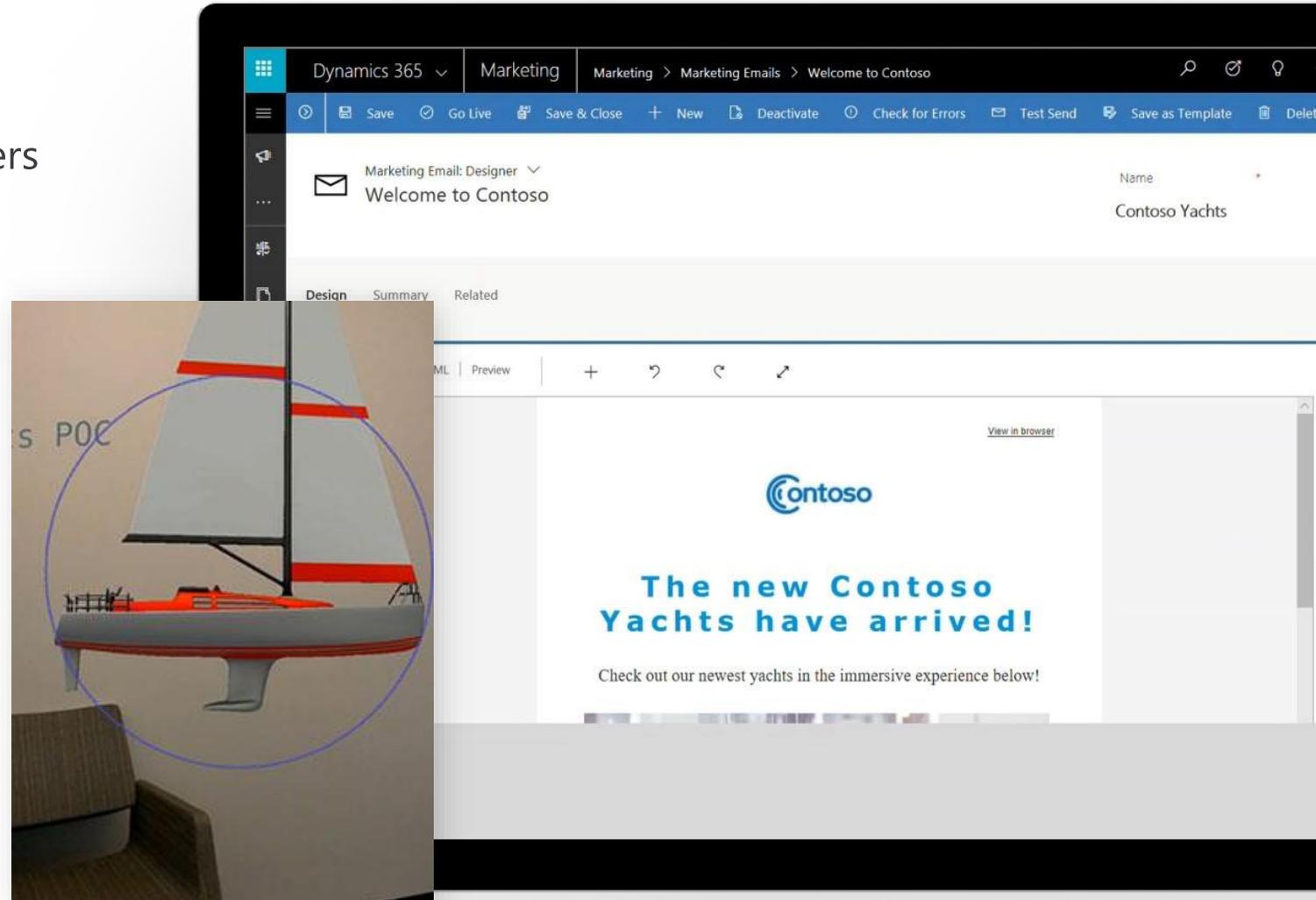
- Event Title:** CONTOSO LTD CONFERENCE
- Date and Time:** 1/26/2017 4:00:00 PM
- Location:** The Waldorf Astoria

A prominent blue button labeled 'Register Now!' is positioned in the lower right area of the event information. Below this, a section titled 'Speakers' is visible, featuring four circular profile pictures of the speakers: a man in a blue shirt and apron, a woman with glasses, a man in a suit, and a woman in a pink top.

# Align sales and marketing

# Create a single view of prospects

Unify data across contacts, leads, and customers through seamless integration with Dynamics 365 Sales



# Identify, target, and close top accounts

Have the marketing benefits of personalized, account-based content and nurture activities

The screenshot displays a customer journey builder interface. At the top, a header reads "Customer Journey: Information" and "New Customer Journey". The main workflow consists of several steps: "Segment Group my customers", "Marketing Email Message event invitation", "Trigger registered?", "Scheduler wait until event", and "Trigger email opened?". A central panel titled "Select a customer journey template" lists various templates such as "Announcement", "Blank Template", "CJ", "Customer Onboarding", "Event Marketing", "High Touch Marketing", "Monthly Newsletter", and "Simple Email Journey". On the left, a "Data" panel shows volume and KPIs. On the right, a "Toolbox" and "Properties" panel are visible.

Volume		
Inflow	11	100.00 %
Processing	0	0.00 %
Blocked	0	0.00 %
Failed	0	0.00 %
Processed	11	100.00 %

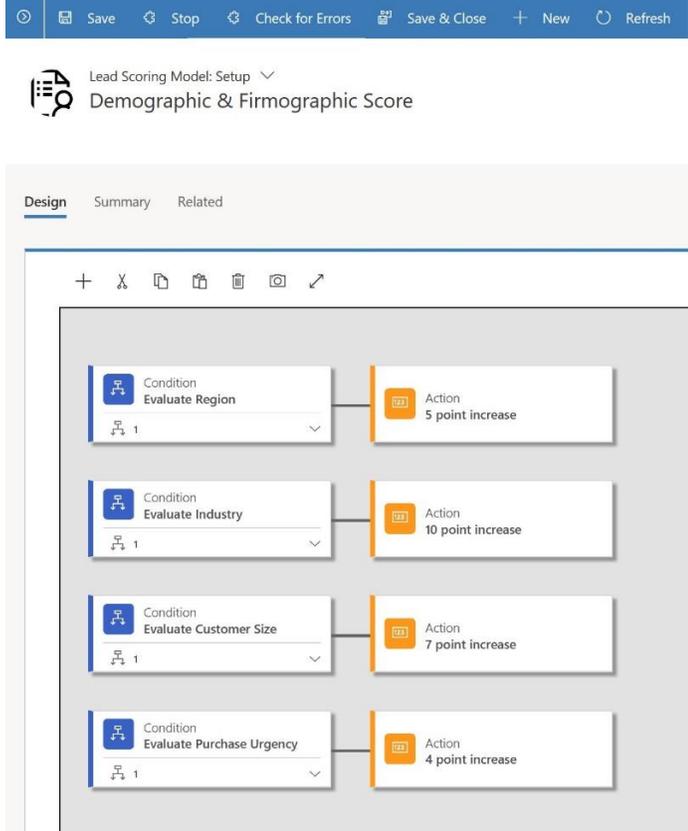
  

KPIs		
Delivered	11	100.00 %
Opened	4	36.36 %
Clicked	4	36.36 %
Soft bounced	0	0.00 %
Hard bounced	0	0.00 %
Blocked	0	0.00 %
Block bounced	0	0.00 %

Name	Status	Contacts
Announcement	SYSTEM	SYSTEM
Blank Template	SYSTEM	SYSTEM
CJ	SYSTEM	Demo Marketing
Customer Onboarding	SYSTEM	SYSTEM
Event Marketing	SYSTEM	SYSTEM
High Touch Marketing	SYSTEM	SYSTEM
Monthly Newsletter	SYSTEM	SYSTEM
Simple Email Journey	SYSTEM	SYSTEM

# Track and prioritize leads

Follow leads across all touchpoints with multiple lead-scoring models and sales readiness grades

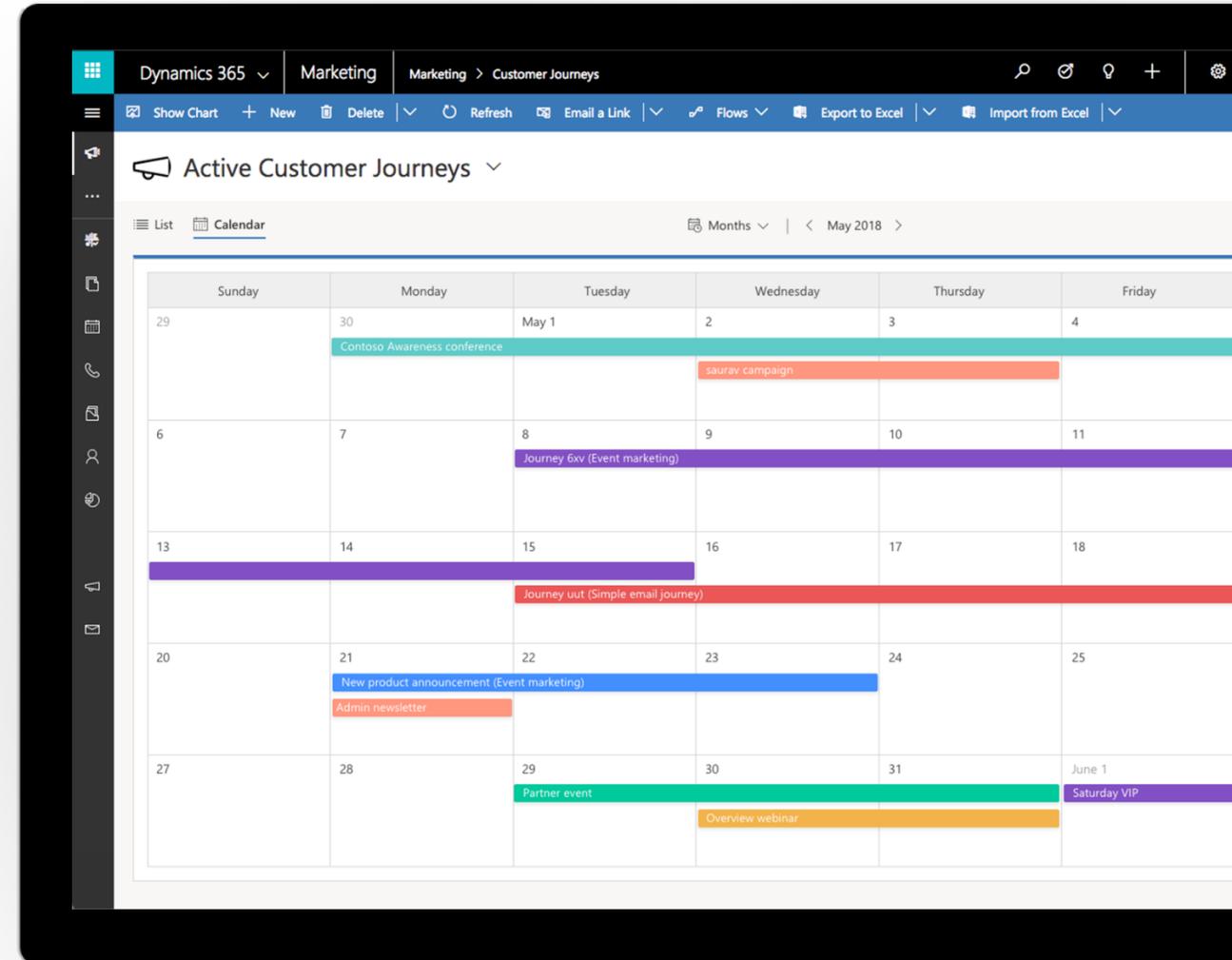


The screenshot displays a software interface for configuring a lead scoring model. At the top, a blue navigation bar contains icons for Save, Stop, Check for Errors, Save & Close, New, and Refresh. Below this, the breadcrumb path reads "Lead Scoring Model: Setup" followed by "Demographic & Firmographic Score". The interface is divided into three tabs: "Design" (selected), "Summary", and "Related". A toolbar with icons for adding, deleting, and linking elements is visible above the main content area. The main content area shows four rows of configuration items, each consisting of a condition box on the left and an action box on the right, connected by a horizontal line. Each condition box includes a blue icon, the text "Condition", a specific evaluation name, and a dropdown menu set to "1". Each action box includes an orange icon, the text "Action", and a specific point increase value.

Condition	Action
Evaluate Region	5 point increase
Evaluate Industry	10 point increase
Evaluate Customer Size	7 point increase
Evaluate Purchase Urgency	4 point increase

# Increase productivity

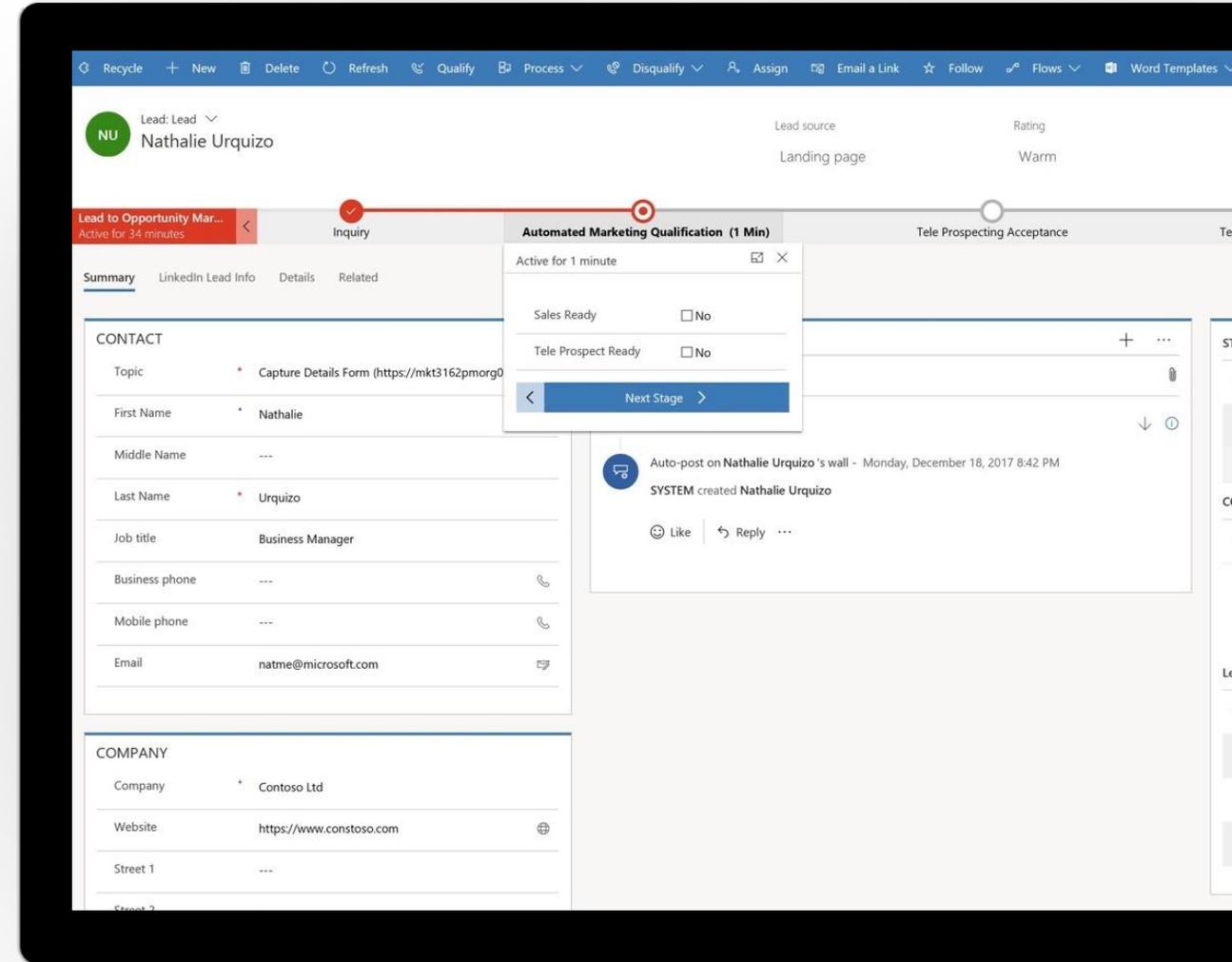
Use marketing automation features including pre-made workflows to automatically hand off promising leads and drive follow-ups



# Boost productivity and simplify collaboration

Use familiar Office 365 tools, shared calendars, and cross-team visibility into campaigns and leads

Integrate seamlessly with Dynamics 365 Sales, Microsoft Customer Insights, Microsoft Excel, Microsoft Power Automate, and Microsoft Forms Pro



**Make  
informed decisions**

# Improve marketing effectiveness

Get efficiency advantage of pre-built dashboards and marketing analyzers – or build your own custom dashboards



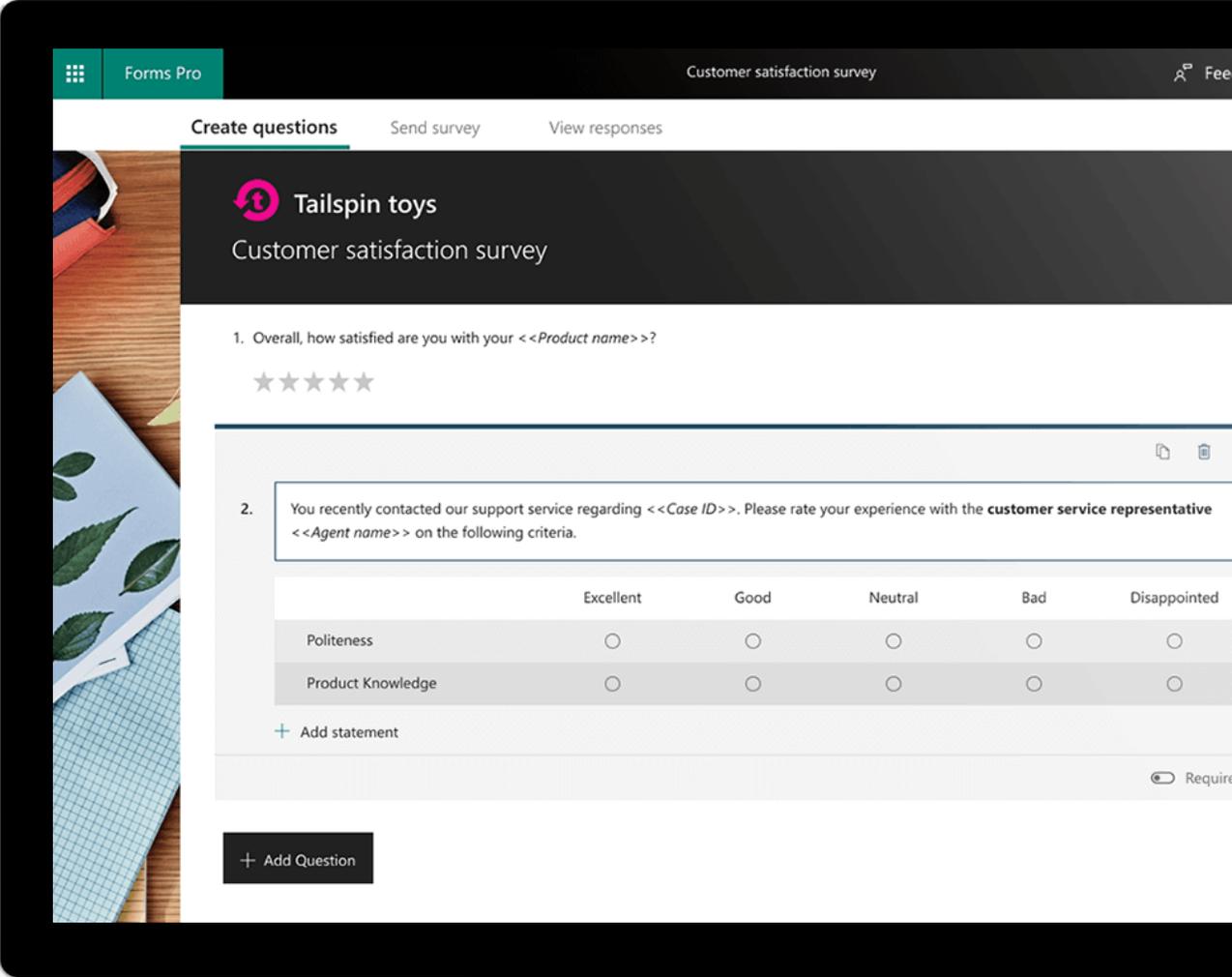


# Better understand customer needs

Monitor the customer journey

Gather information using customizable online surveys with Microsoft Forms Pro integration

Create surveys to measure customer sentiment and satisfaction at every touchpoint



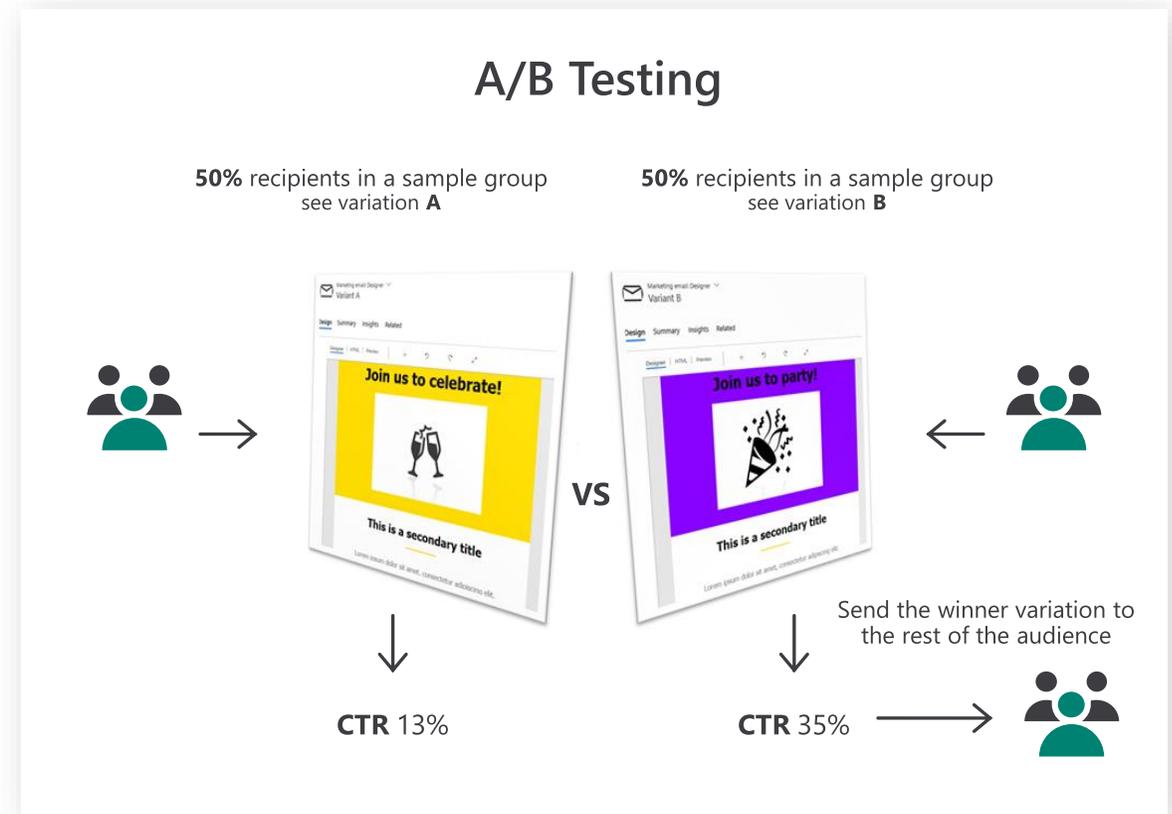
# Target the right audience

Send the email that resonates the most with your target audience

Focus on the highest-priority leads by leveraging interaction insight data from Dynamics 365 Customer Insights

Use A/B testing for emails with dynamic content

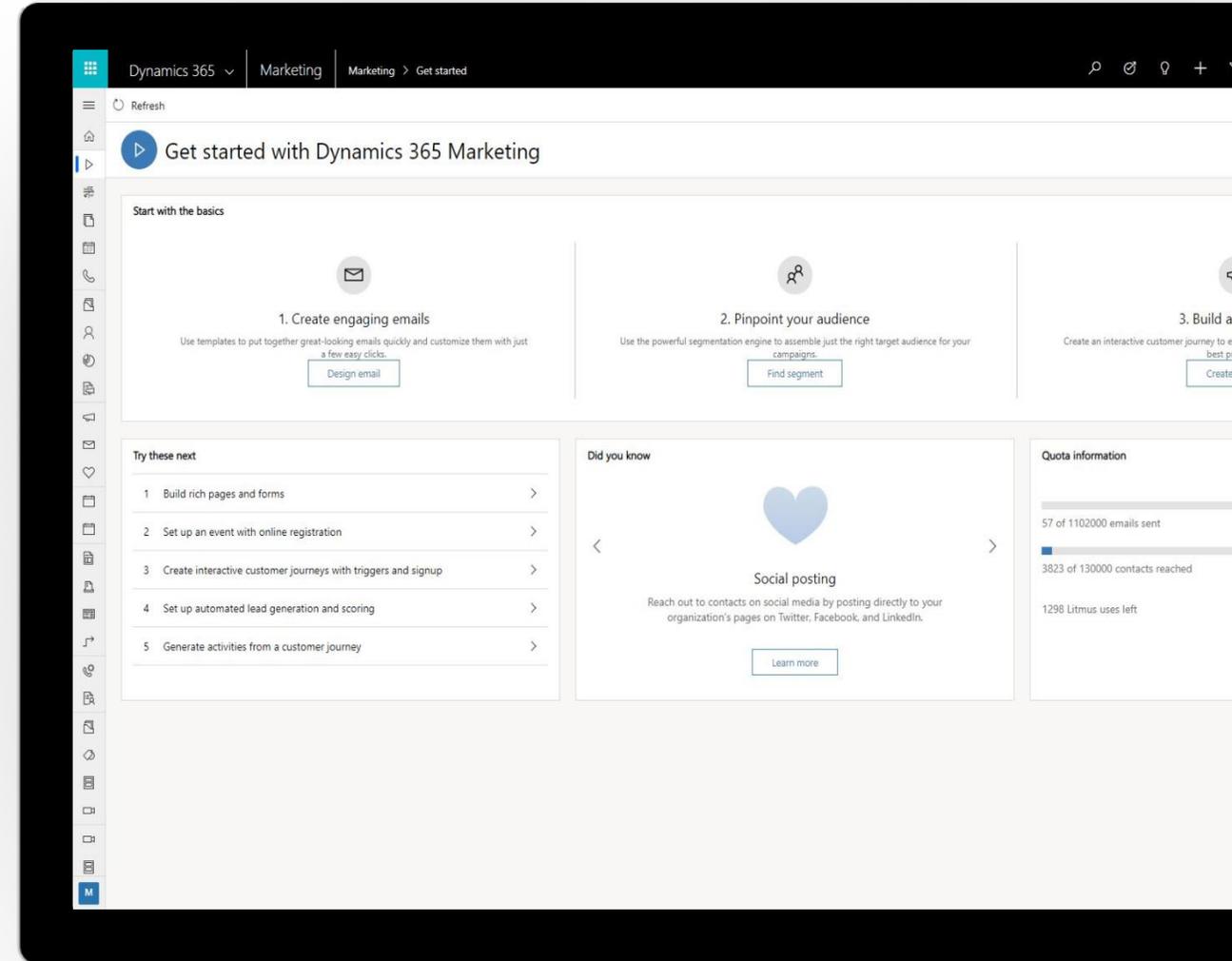
Set up multiple lead-scoring models to enrich customer engagements



**Grow with an  
automated platform**

# Adapt Dynamics 365 Marketing to your needs

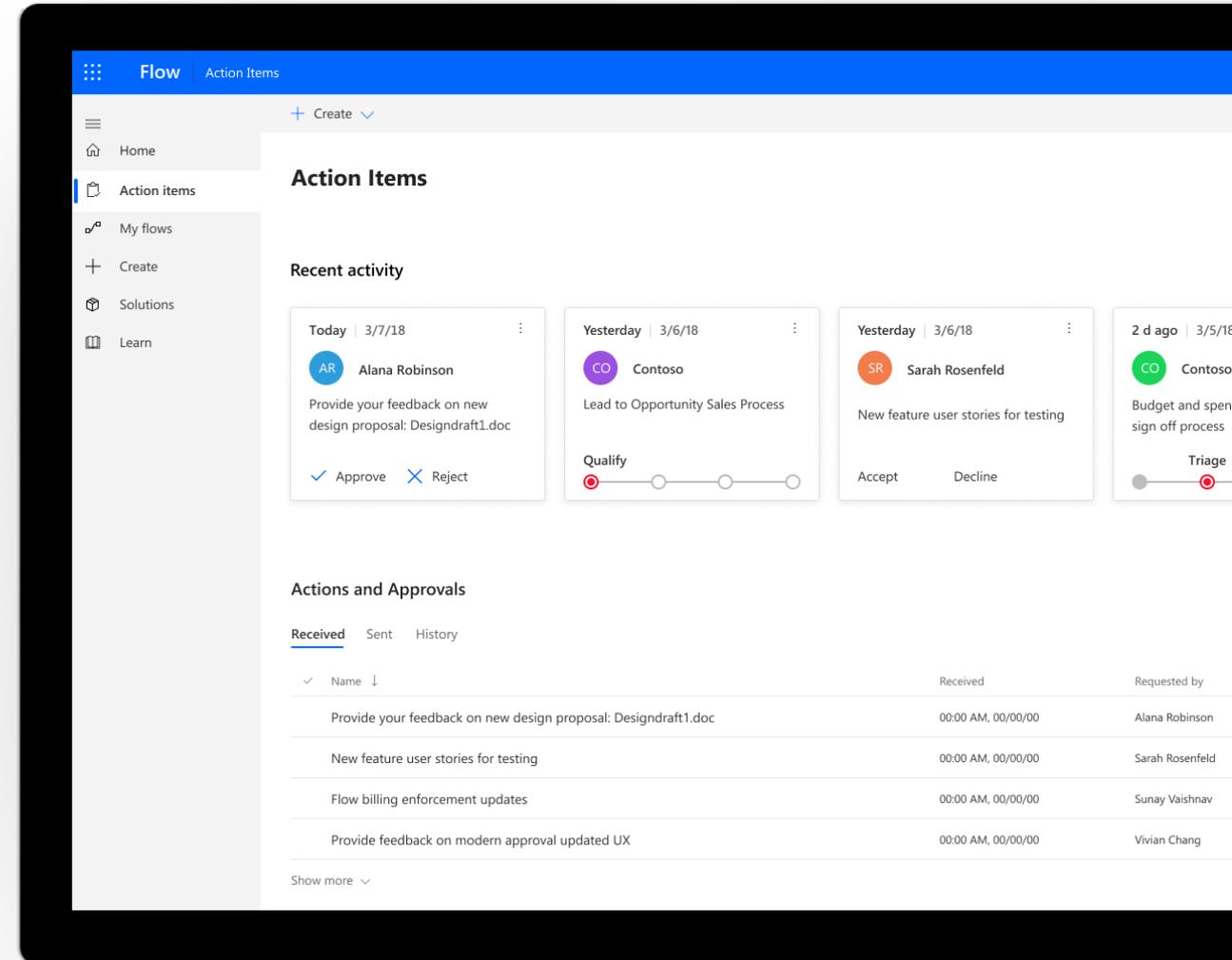
Use tools like no-code visual editors that simplify build-and-deploy processes for the web as well as mobile apps



# Easily integrate data

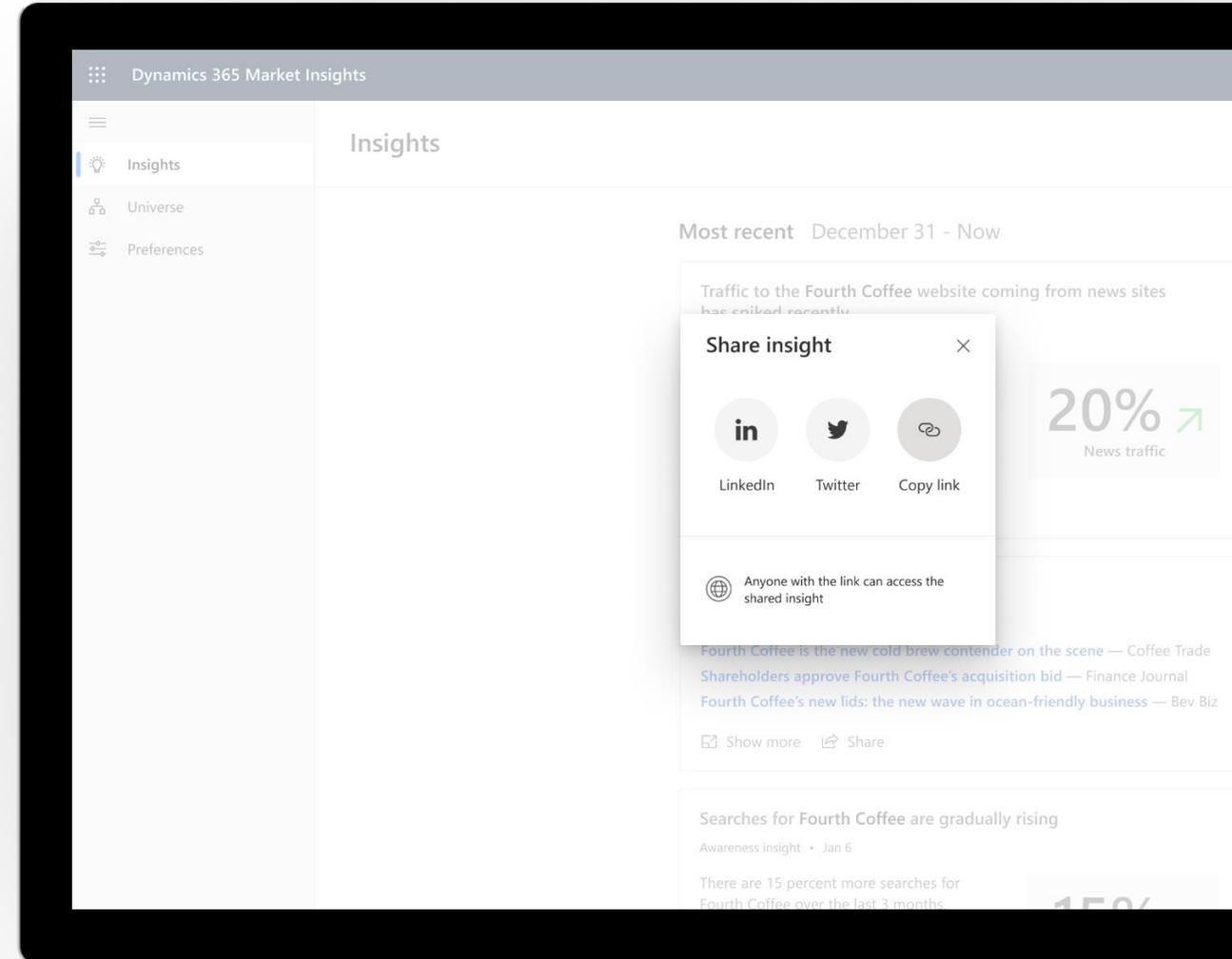
Utilize data from Dynamics 365 and third-party apps and systems

Automate processes with either built-in workflows or create new Microsoft Power Automate workflows



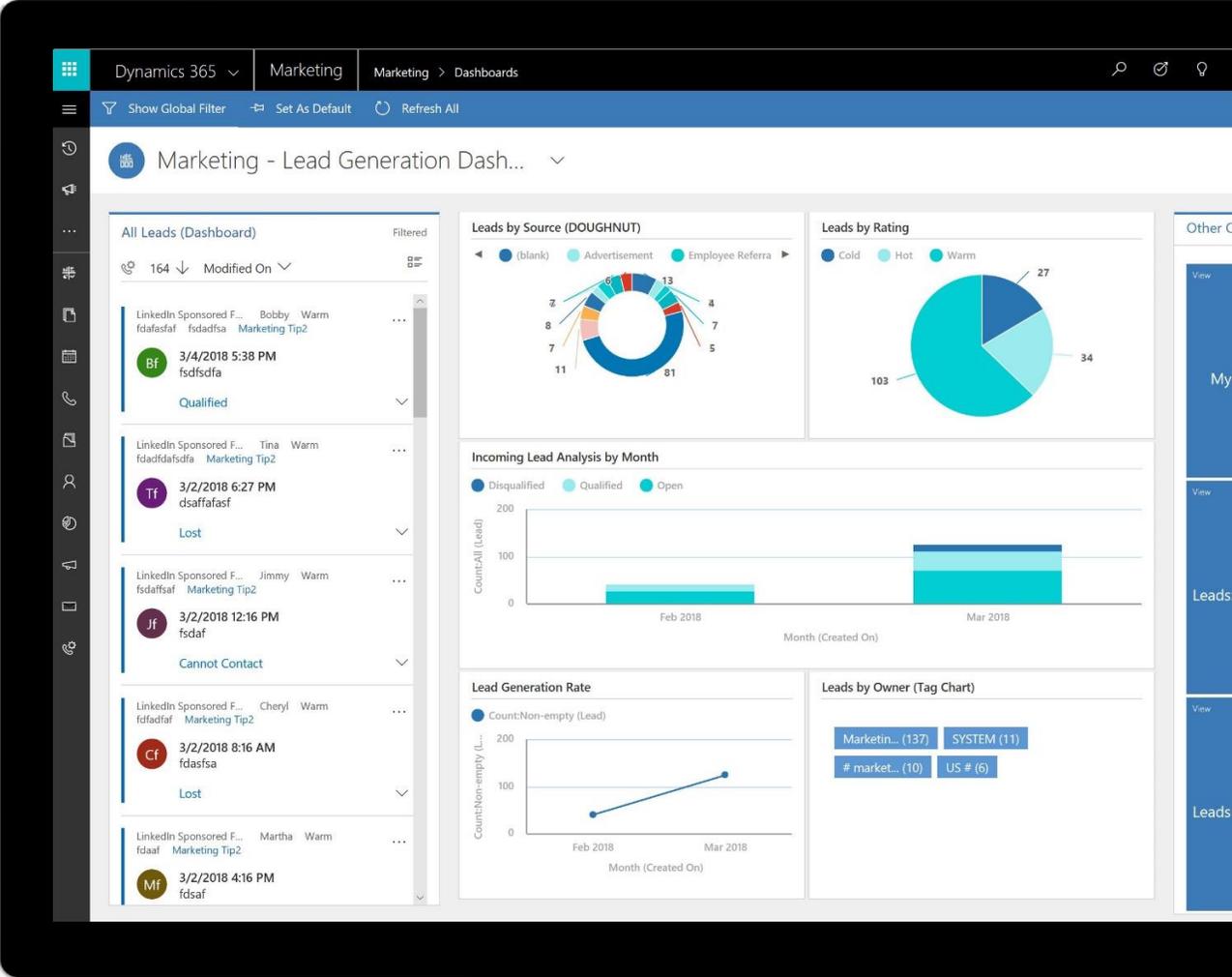
# Enhance marketing campaigns

Customer journey and segment APIs can inform target segments and complete campaigns



# Reduce operating costs

Scale your operation worldwide with a secure global infrastructure of data centers



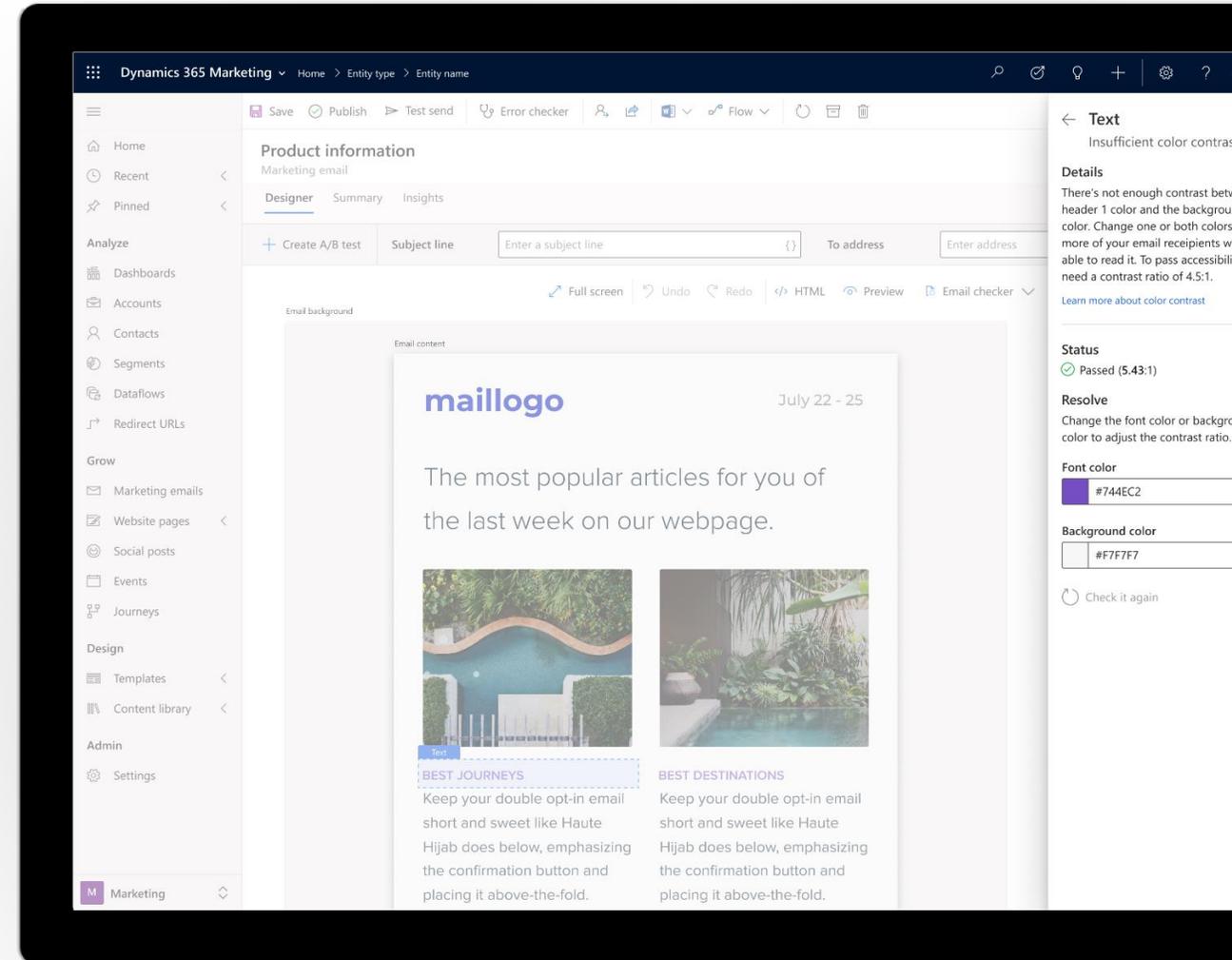
# Market globally & maintain compliance

Meet today's privacy, trust, and accessibility requirements

Request, capture, and store consent—a core tenet of GDPR

Drive your marketing activities based on consent given by your audience

Automatic blocking when proper consent is missing



# What's new in 2020 release Wave 1

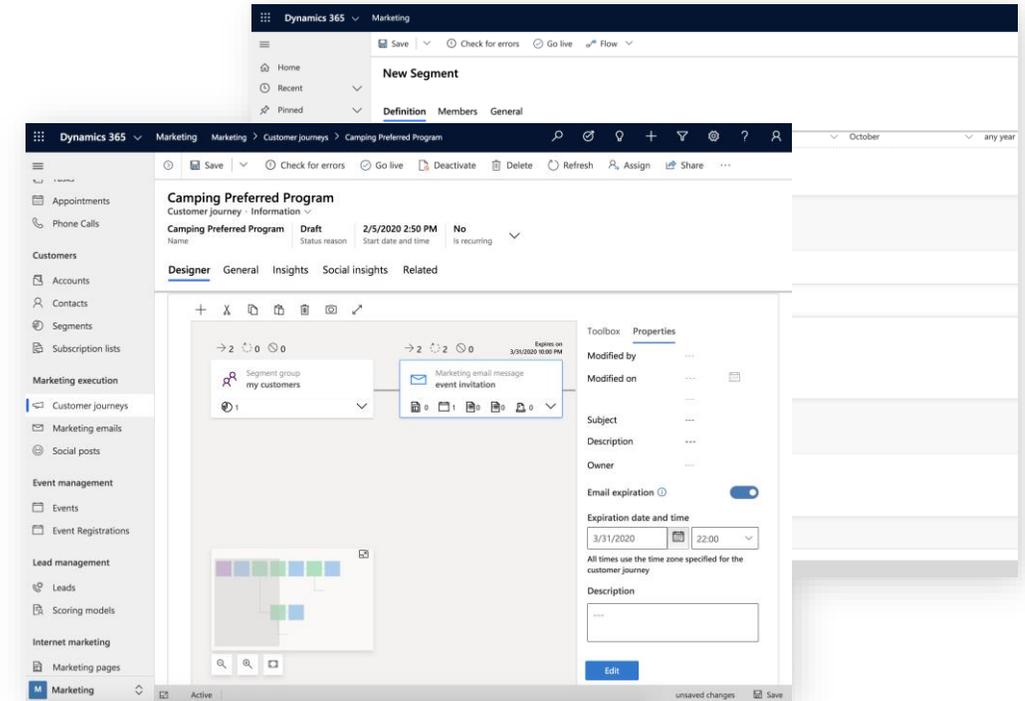
# Personalized marketing

## Improved segment design & management

Respond rapidly to market changes by defining dynamic segments more quickly and intuitively.

## Enhanced customer journey experience

Orchestrate the design and impact of personalized customer journeys to increase customer engagement.



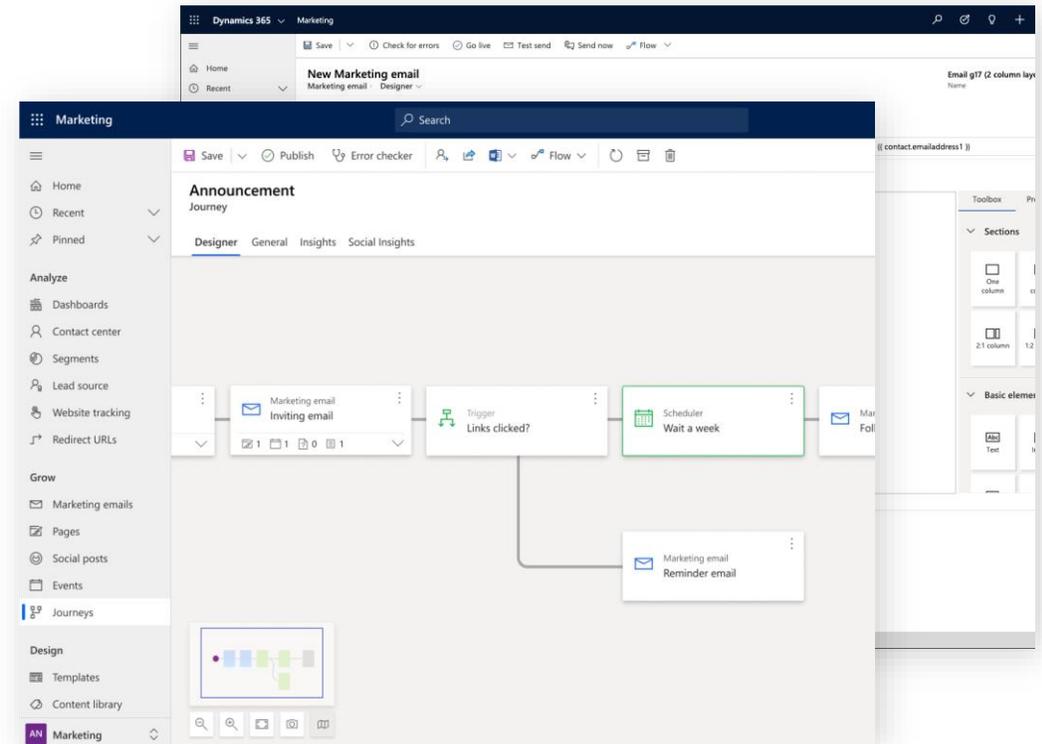
# Marketing made simple

## Test-send dynamic emails

Design visually rich marketing email messages containing fully rendered dynamic content that capture customer attention.

## Automated scheduler

Maximize customer engagement using AI and reach contacts at the right time for them to open your messages.



# Intelligent, connected engagement

## Surveys with Microsoft Forms Pro

Increase information available for data-driven decisions. Run surveys using Forms Pro directly from a Dynamics 365 Marketing email.

## Export data to Microsoft Excel

Dynamics 365 Marketing tracks how contacts interact with marketing initiatives. Export that data directly into Microsoft Excel for increased analysis.

## Extended event management capabilities

Event Management is both easier and more comprehensive. Major improvements increase the speed and concurrency of registration.

The screenshot displays the Dynamics 365 Marketing interface. At the top, there's a navigation bar with 'Dynamics 365' and 'Marketing'. Below it, a 'New Event' section shows a progress bar with stages: 'EventMainBusinessPhone: Active for less than one mi...', 'Preliminaries (< 1 Min)', 'Agenda', 'Organize', 'Promote', and 'Launch'. The main content area is titled 'Forms Pro' and 'Customer satisfaction survey'. It features a survey form with the following questions:

- Overall, how satisfied are you with your <<Product name>>? (★★★★★)
- You recently contacted our support service regarding <<Case ID>>. Please rate your experience with the customer service representative <<Agent name>> on the following criteria.

Below the survey form, there are two tables:

Delivery details	
Sent	4
Delivered	2
> Blocked	0
▼ Delivery failed	2
Hard bounced emails	2
Soft bounced emails	0
Block bounced emails	0

Hard bounced emails			
Contact name	Email address used	Bounce category	Timestamp
John Smith	john.smith@cont...	inactive-mailbox	2/20/2020 4:31 PM
Joe Doe	joe.doe@contos...	inactive-mailbox	2/20/2020 4:31 PM

On the right side, there's a 'Marketing forms' list with items like 'Event registration 01/22/2020 6:38 AM', 'Registration form... Feb 01/23/2020 9:57 AM', '23\_registration 01/23/2020 9:23 AM', and '24\_check FF 01/24/2020 6:03 AM'. There's also a 'New Marketing form' button.

# Marketing made simple

## Improved email content designer

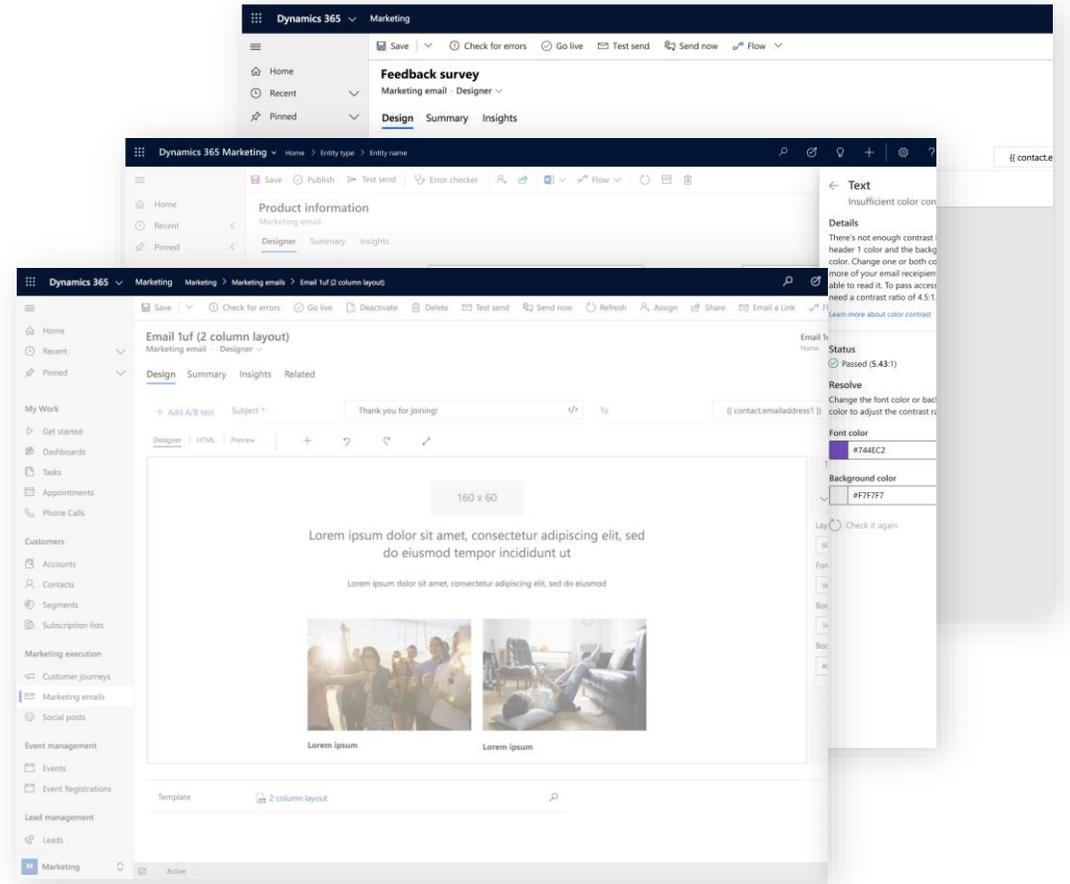
More intuitive design plus updated styling lets you create attractive and sophisticated email messages, capturing customer attention more effectively.

## Compliance made easier

Stay compliant with GDPR and accessibility guidelines. Consolidate multiple notifications and confirmations into a single message.

## Spam checker

AI-based assessments diagnose and mitigate any issues with email content. Increase confidence that your emails will reach their targets.



# Learn more



Visit [Dynamics 365 Marketing](#) to try the application



Guides for users and admins are available in our [help documentation pages](#)



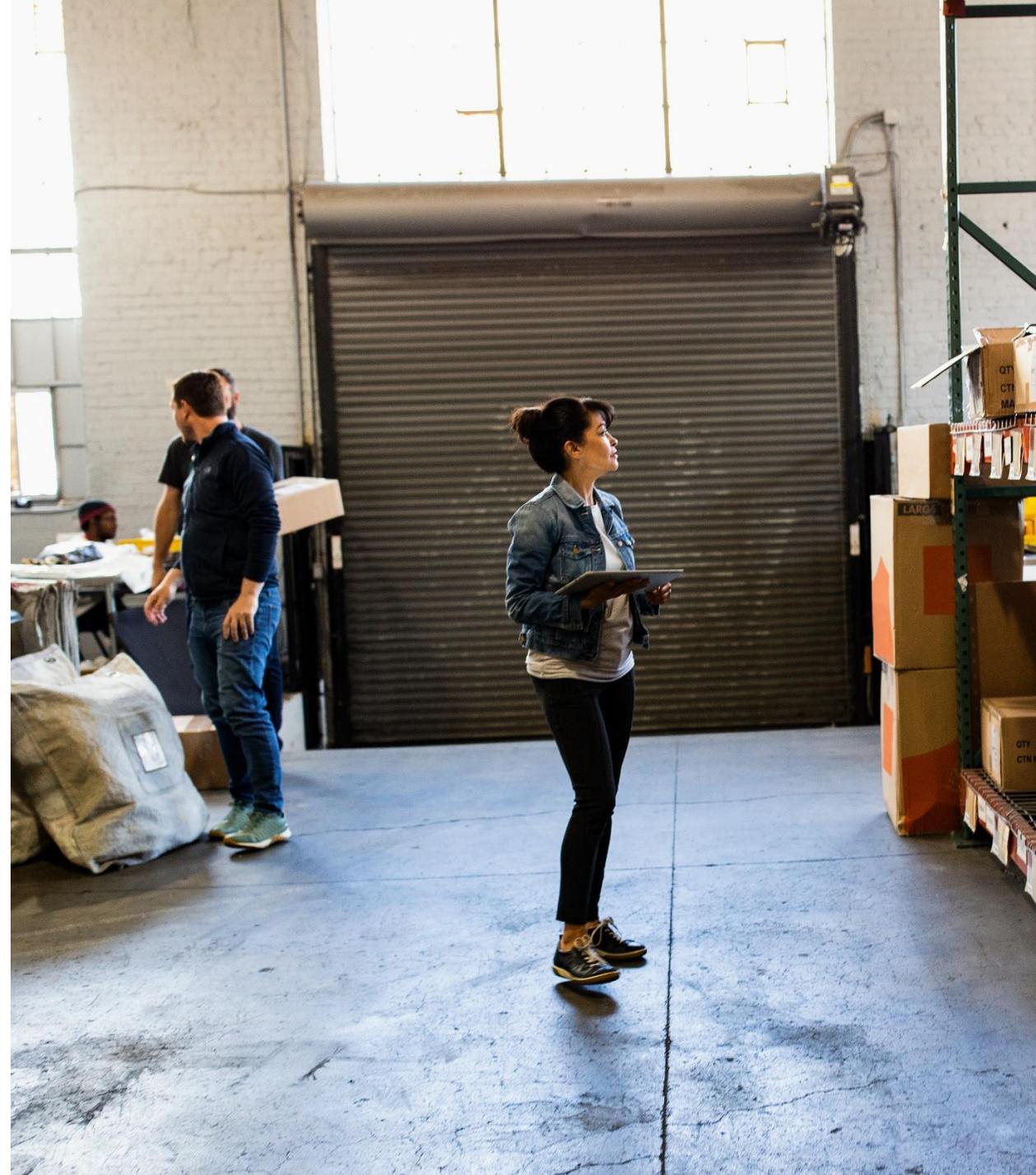
[Connect](#) with Microsoft experts or local Dynamics 365 partners



Learn more from [courses](#) and [certifications](#)



Engage with product experts in [Community Forum](#)



 Microsoft Dynamics 365



Thank you.