



RAPID RESULTS

Dynamics 365 for Marketing





DREAM **BIG**
START **SMALL**
DELIVER **FAST**



RAPID RESULTS

We have developed 'Rapid Results' offering to enable our clients to take advantage of the core 'out of the box' capabilities of Dynamics 365 for Marketing, to deliver immediate results and to provide a platform upon which additional capabilities can be added in the future. All this can happen within a short timeframe at a fixed cost, and without the risk associated with a lengthy and complex implementation.

Following recognised industry best practice, Rapid Results focuses on delivering the base capability in the first stage of a Customer Engagement project. This approach provides a platform for future improvements, allowing additional capabilities and customisations to be added as needs require.

6-week duration

\$65,000 (ex. GST) fixed cost

OBJECTIVE

Nurture leads to convert them into loyal Customers, influence the customer-driven touchpoints and engage them by a personalised customer journey.

"A brand is the set of expectations, memories, stories and relationships that, taken together, account for a consumer's decision to choose one product or service over another. "

Seth Godin





DELIVER PERSONALISED AND CONSISTENT EXPERIENCE



Personalisation

Deliver personalised and consistent experiences to engage customers with right messaging at the right time.



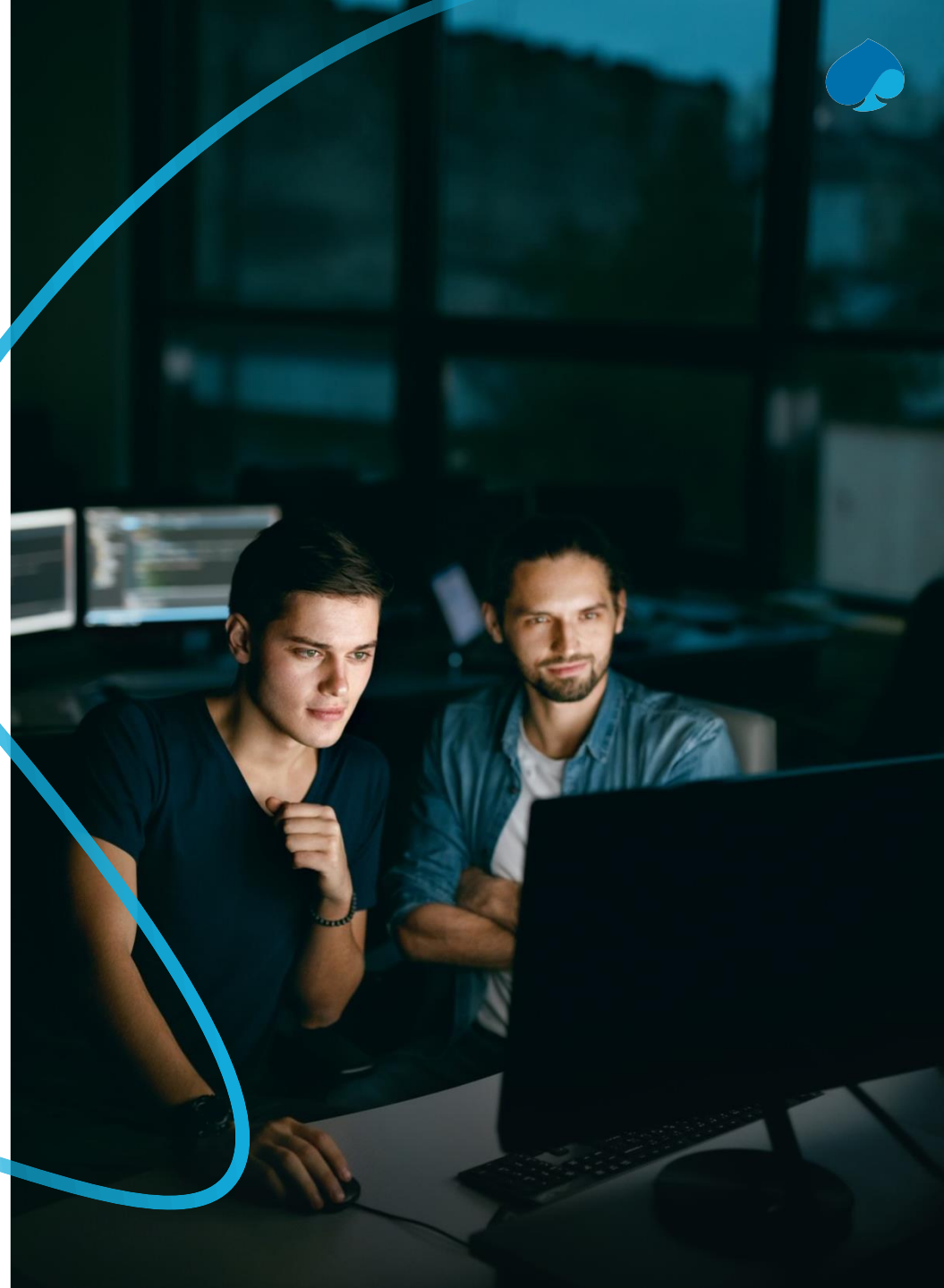
Customer Journey

Orchestrate a customer journey to nurture leads and turn them into loyal customers.



Embedded Intelligence

Turn insights into relevant action using AI-driven recommendations for content, channels, customer segmentation, and analytics.





DYNAMICS 365 MARKETING



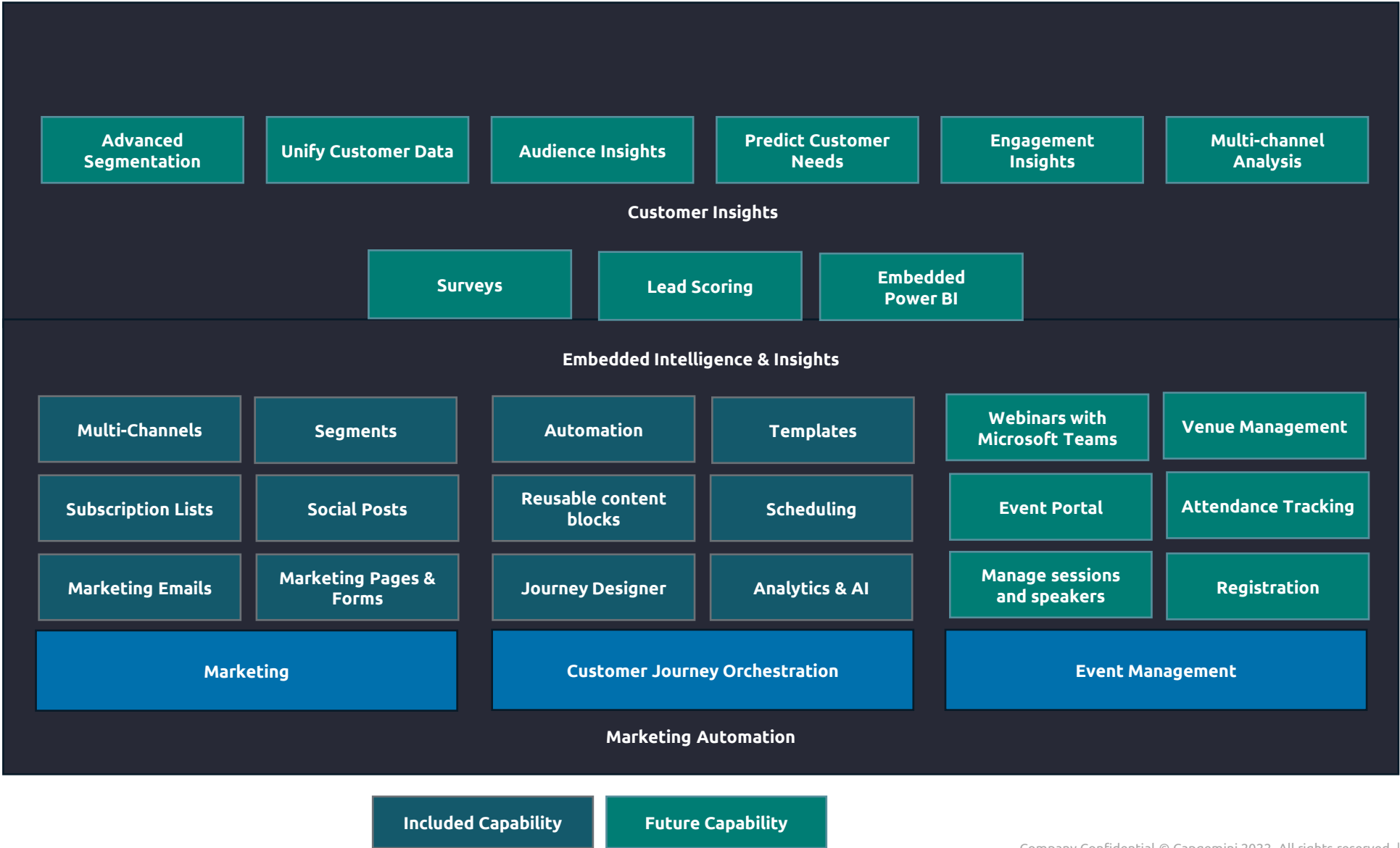
MARKETING CAPABILITY



Intelligence and
Insights



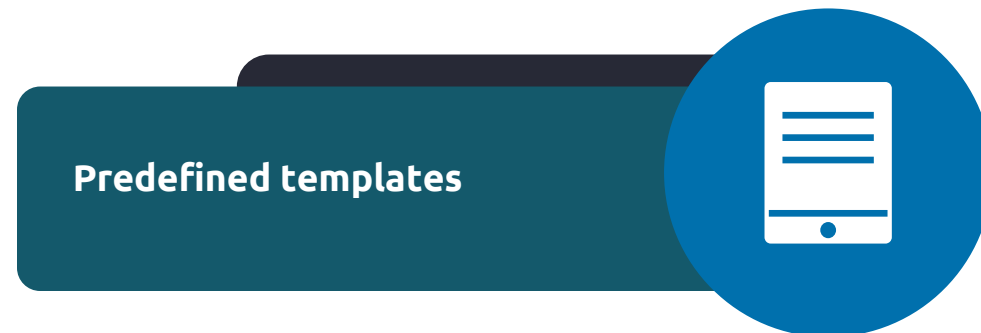
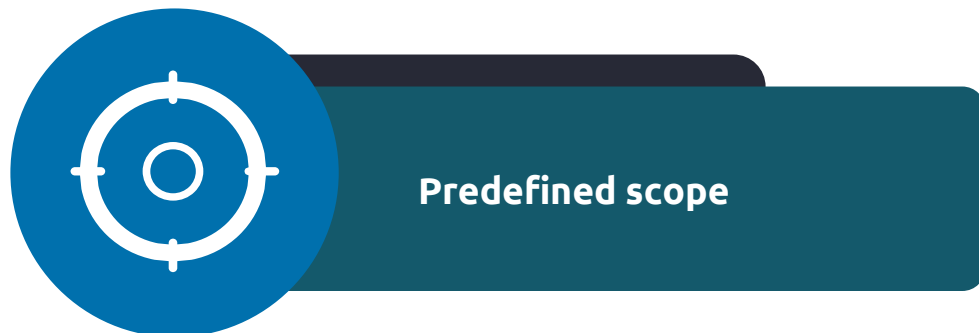
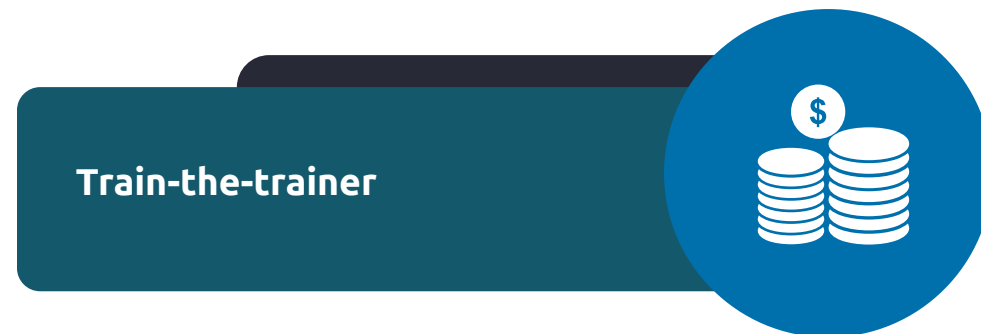
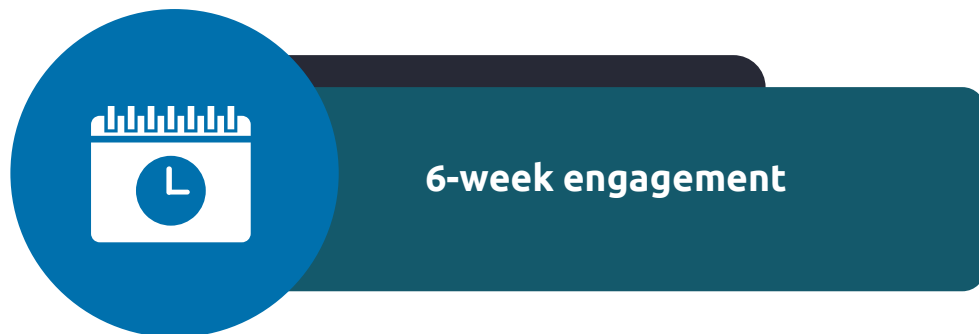
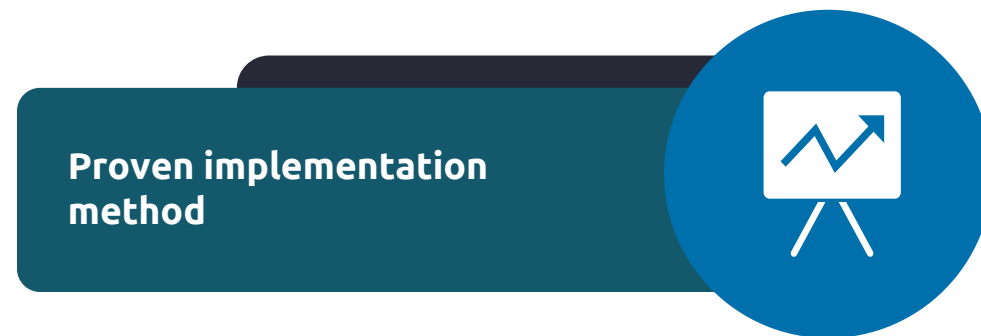
Dynamics 365
Marketing
Model Driven
Business Application



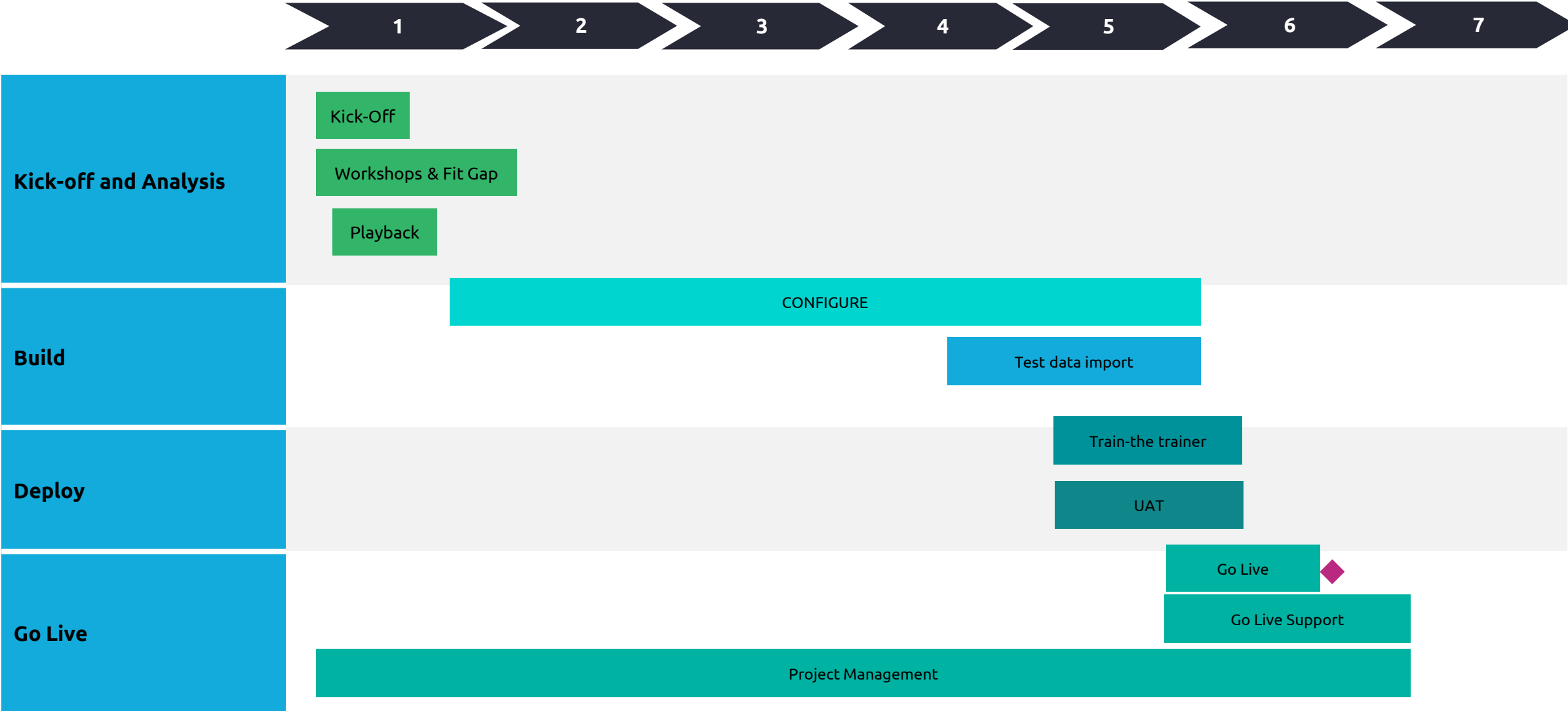


PROJECT CONSTRUCT

OUR APPROACH



PROJECT TIMELINE





PROJECT SCOPE

Rapid Results deployment of Dynamics 365 for Marketing

- High-Level workshop to understand your base Marketing requirements.
- Setup of Out of the Box (OOB) functional areas related to Marketing native capability.
- Configuration of up to 4 business process flows with up to 8 stages and 6 steps.
- Implementation of up to 30 field configurations.
- Configuration of 4 automated workflows (up to 8 steps each) across the functional areas.
- Configurations of 2 key Customer Journeys
- Data import using Standard import templates for accounts, contacts and open leads.
- Project management and prioritisation with your team on the configurations required to the base system.



INCLUSIONS

■ Base configuration

- Auditing rules and requirements (up to 5 entities), duplicate detection rules (up to 10 simple rules)
- Theme, look and feel (OOB themes)
- Security Roles & Business Units

■ Marketing Configurations

- Initial Marketing setup
- Basic business process flow and workflows (up to 8)
- Customer Journeys (up to 2)
- Views & Entities based on workshop output
- Marketing Forms, Templates, Reusable content blocks and Pages (up to 2 each)
- Custom email, word template and notification (up to 1 each)
- Custom Charts and views
- Mobile Forms configuration

■ Dashboard & Reporting Configuration:

- Power BI connector pack (OOB)
- D365 Marketing dashboard (OOB, up to 2 simple dashboards)

■ Data Migration

- Importing of Accounts and Contacts, and Open Leads supplied by your team in a templated format defined by us.

■ Train-the-trainer

- Training of key users will be done via a train the trainer style approach with standard training materials and with the objective of having super users trained up to deliver training to the rest of the business

■ Deployment & Go-Live

- User Acceptance Testing support (8 hours timeboxed)
- Deployment to Production
- Go-Live Support (4 hours timeboxed)
- Post implementation review and planning of future enhancements and opportunities

■ Assumptions

- Capgemini to be nominated as Claimed Partner of Record (CPoR) for Dynamics 365 and Power Platform.
- Capgemini to be nominated as Digital Partner of Record (DPoR) for Microsoft subscriptions.
- Project deliverable will only include a Production ready solution.
- Only 2 instances (Sandbox & Production) will be configured.



EXCLUSIONS

- Deployment (including training and configuration) of other functional areas that are not specifically mentioned in the inclusions section above e.g. Sales, Customer Service, Field Service or other Business Application components.
- Integration to external systems (This will be viewed as a potential Future Phase).
- Installation and configuration of third party products.
- Development of reports and web resources.
- Setup and configuration of SharePoint, except for enabling the standard Out of the Box Server-Side Integration and Document Management.
- Setup and configuration of Exchange Online or Office 365, except for the enabling of Out of the Box Server-Side Integration with either Exchange On-Premise or Exchange Online.
- Customisations including custom development, custom scripts, plugin and Azure development are excluded from the scope of this project.
- The following aspects of data migration and import:
 - Data cleansing (this is the your responsibility).
 - Extracting data from existing systems (this is your responsibility).
 - Populating Templates with extracted data.
 - Any modification to the standard upload templates.
 - Resolving Data Issues found upon import.



**GET THE
FUTURE
YOU WANT**



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