

# Dynamics 365 Marketing



# 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

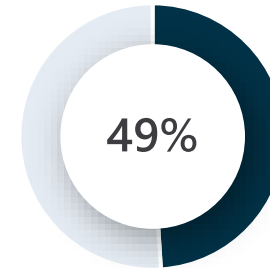
Unsynchronized view of leads and contacts

Stale leads

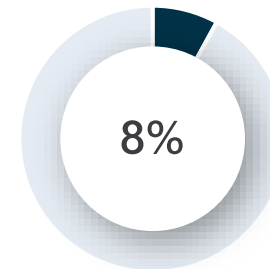
Higher TCO due to integration and maintenance costs

Lack of robust extensibility to support the needs of complex businesses

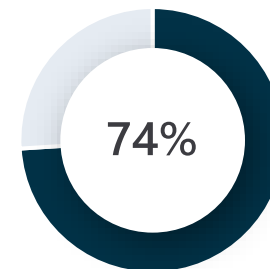
Lack E2E experience orchestration



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



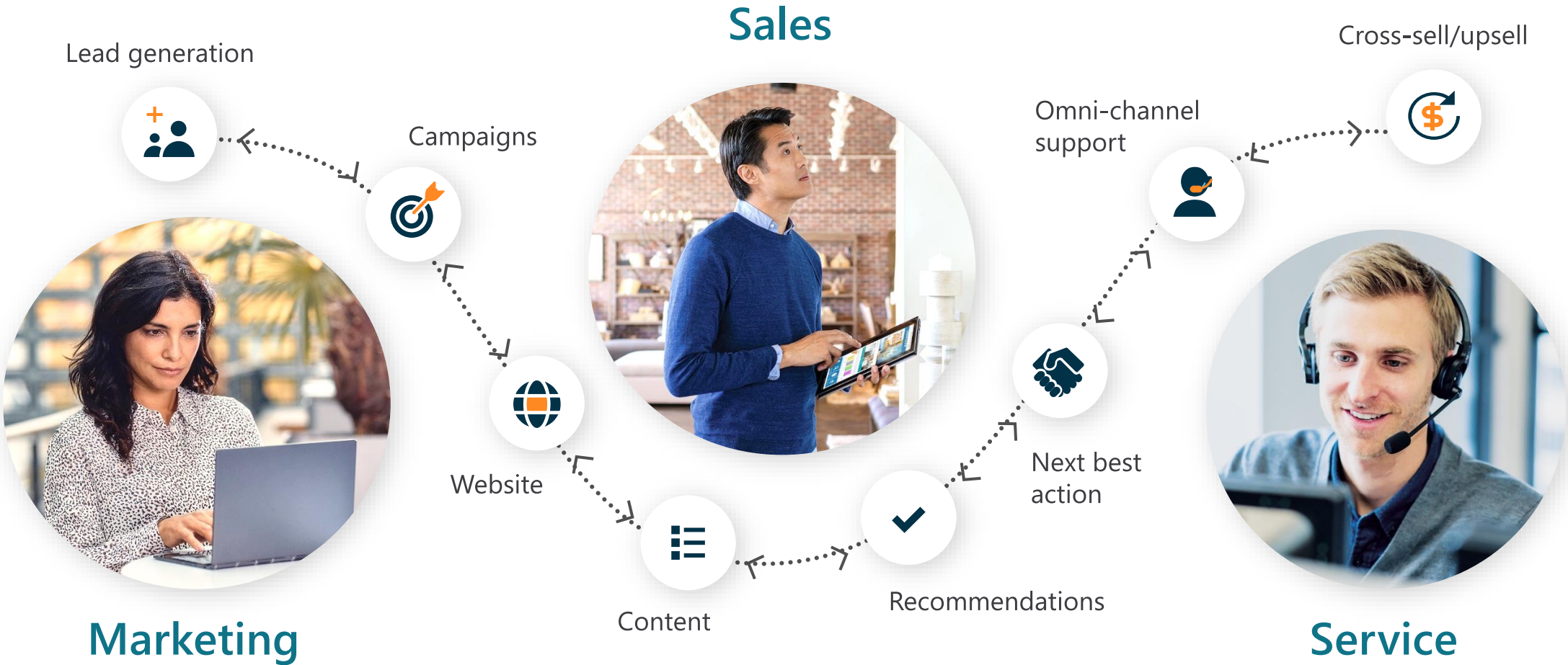


An aerial photograph of a city, likely New York City, showing a mix of modern skyscrapers and older brick buildings. A dense network of light blue lines connects small square nodes, creating a digital grid that overlays the cityscape. The sky is overcast with grey clouds. The overall tone is dark and futuristic.

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



# 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





# 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

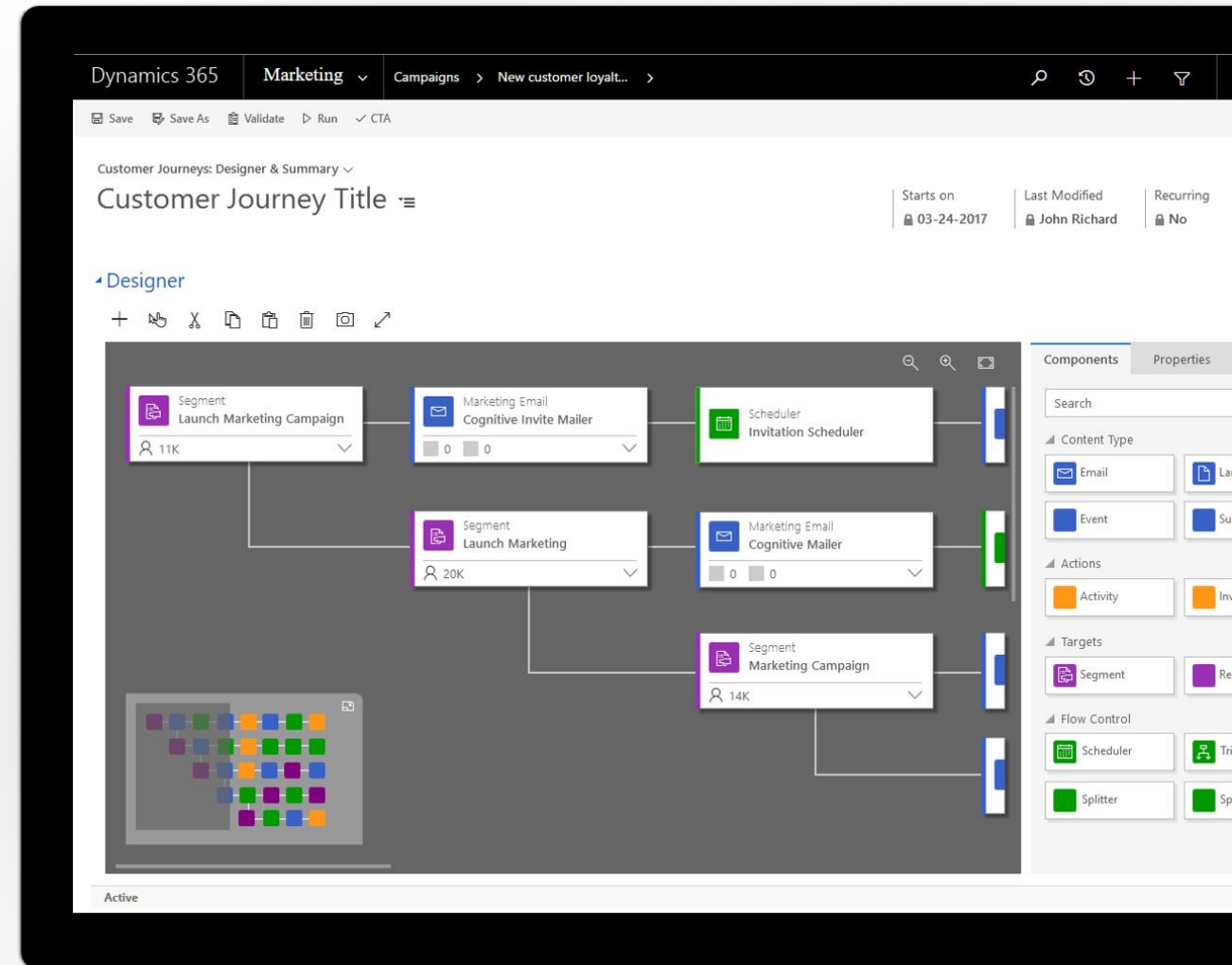
- **Periodic newsletters and congratulatory emails** for key events such as birthdays and anniversaries
- **Notify sellers via emails or route leads** when there is web activity by target audience
- **Welcome emails and post sales nurture** for new customers with helpful links to manuals or how-to videos
- **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





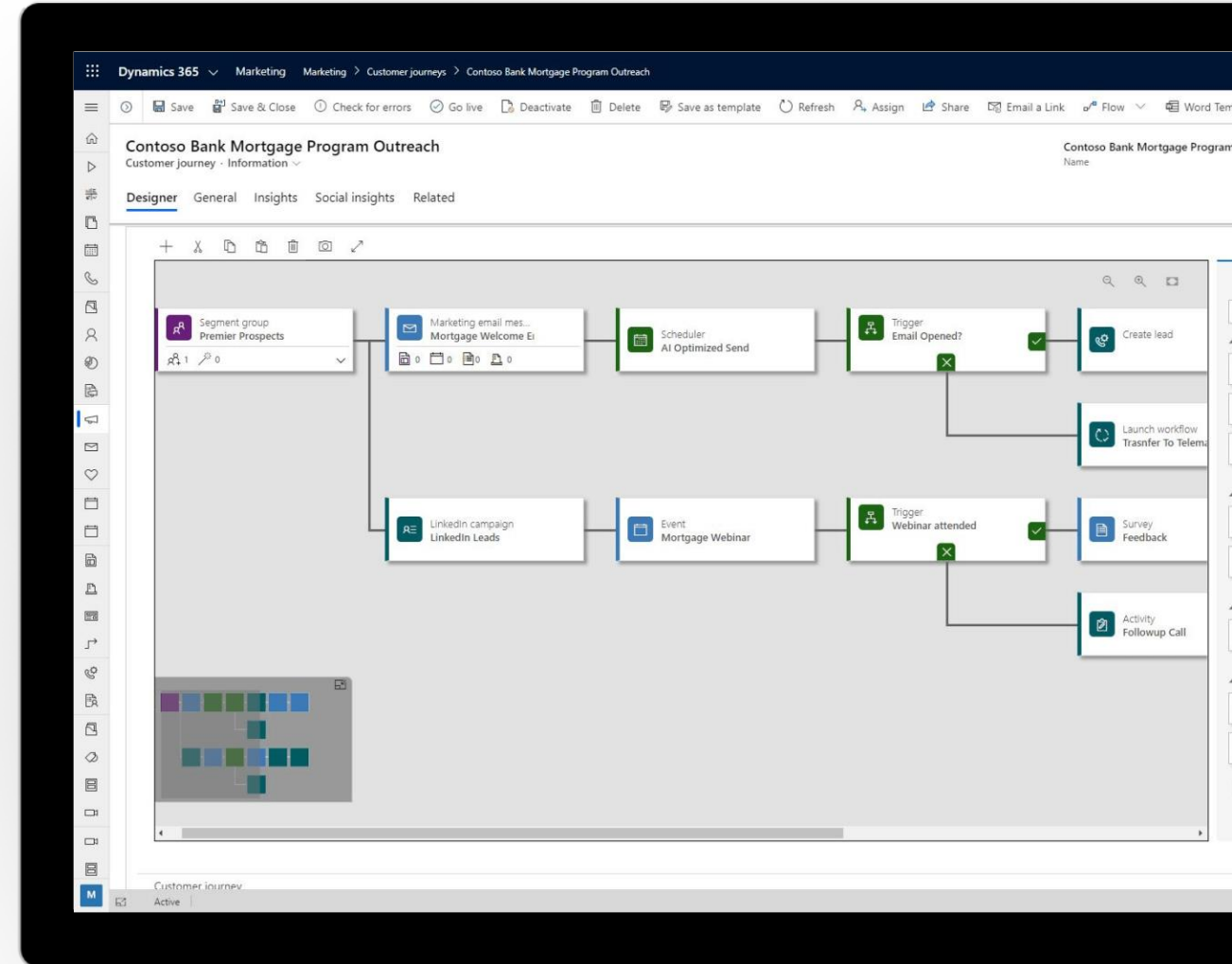
# Orchestrate customer journeys

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 top navigation bar shows the path: Dynamics 365 > Marketing > Marketing > Leads > David Li. Below the navigation bar, there are several action buttons: Recycle, New, Delete, Refresh, Collaborate, Qualify, Process, Disqualify, Add to Marketing List, Assign, Share, Email a Link, and Follow. The lead's name and profile picture are shown, along with the status "Lead - Lead". A red progress bar indicates the lead's status, with stages: Inquiry, Automated Marketing Qualification, Tele Prospecting Acceptance, and Tele Prospecting Qu. The main content area is divided into sections: Overview, Email interactions, Web interactions, Event interactions, Marketing form interactions, and Subscription list interactions. The Overview section shows "Overall data" with "Lead age in days" at 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), Website visited (7/18/2019 9:39 AM), and Website visited (7/18/2019 9:39 AM). The Lead progress over time section shows a progress bar at 125. The Windows taskbar is visible at the bottom of the screen.



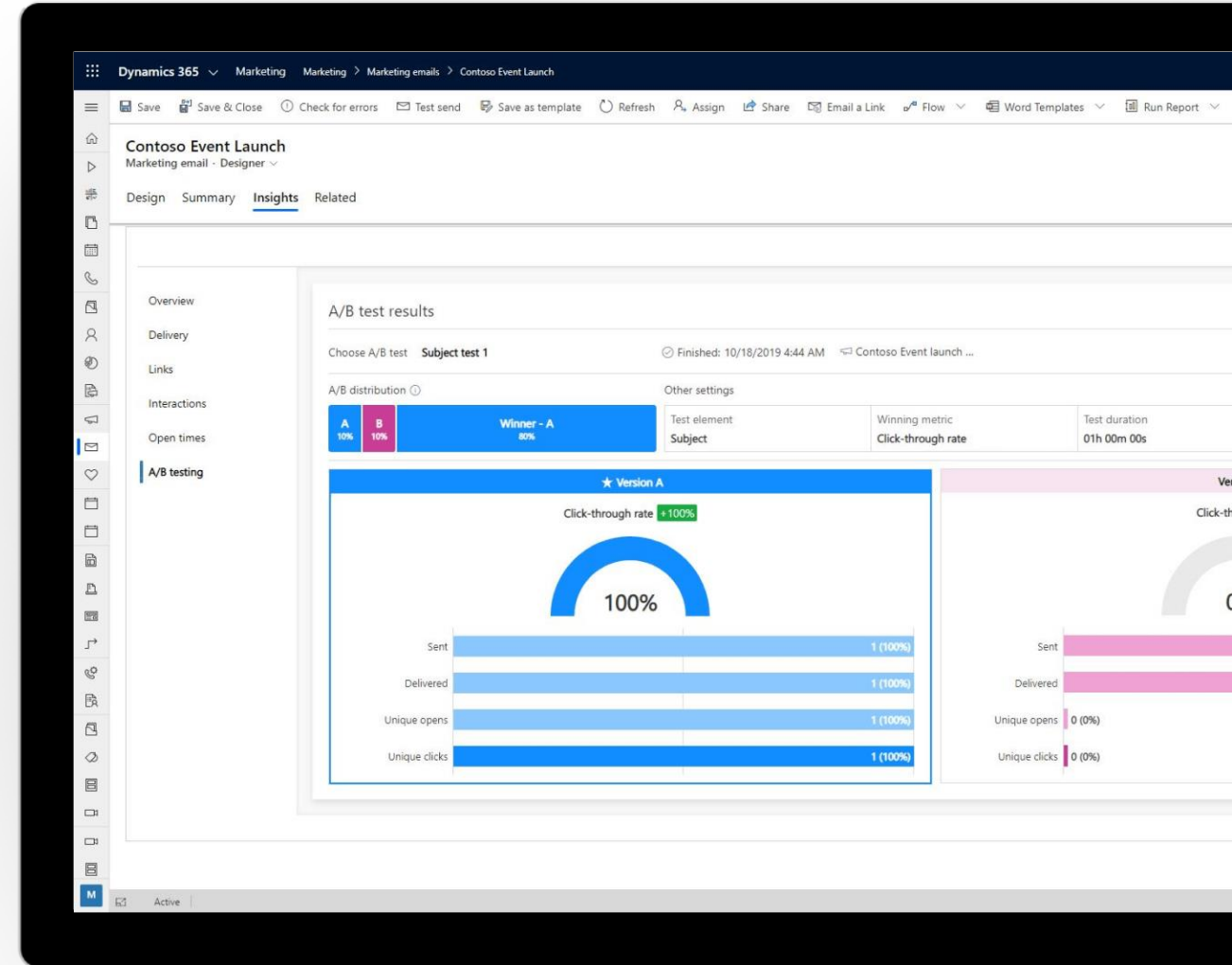
# Make informed decisions

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

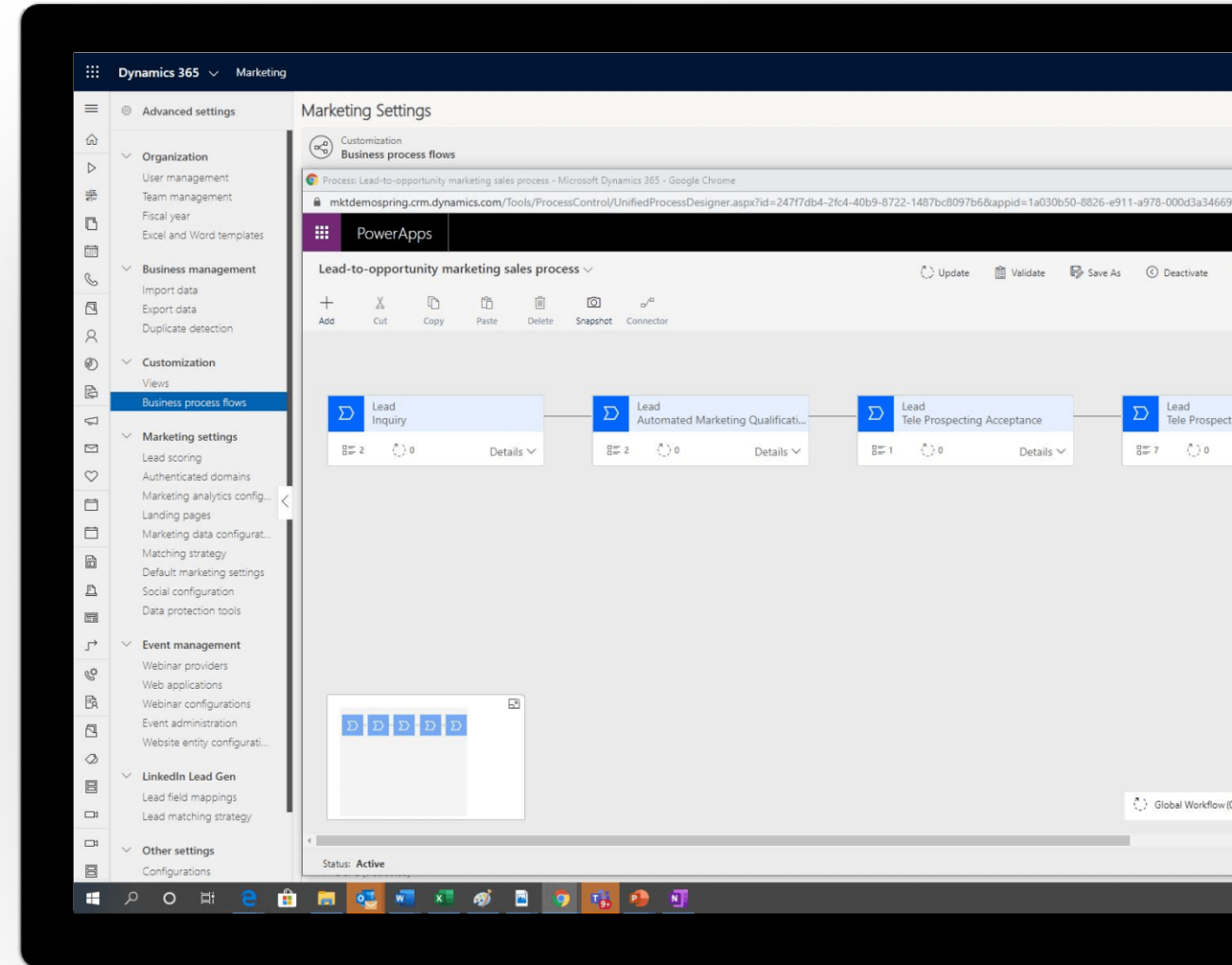
Adapt Marketing to your needs

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 workspace shows a workflow with the following steps: 1. Segment Group 'my customers', 2. Marketing Email Message 'event invitation', 3. Trigger 'registered?' (with a green checkmark), 4. Scheduler 'wait until event', and 5. Trigger 'email opened?' (with a green checkmark). A 'Toolbox' on the right lists various components like Content, Actions, and Targets. In the foreground, a 'Select a customer journey template' dialog 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	

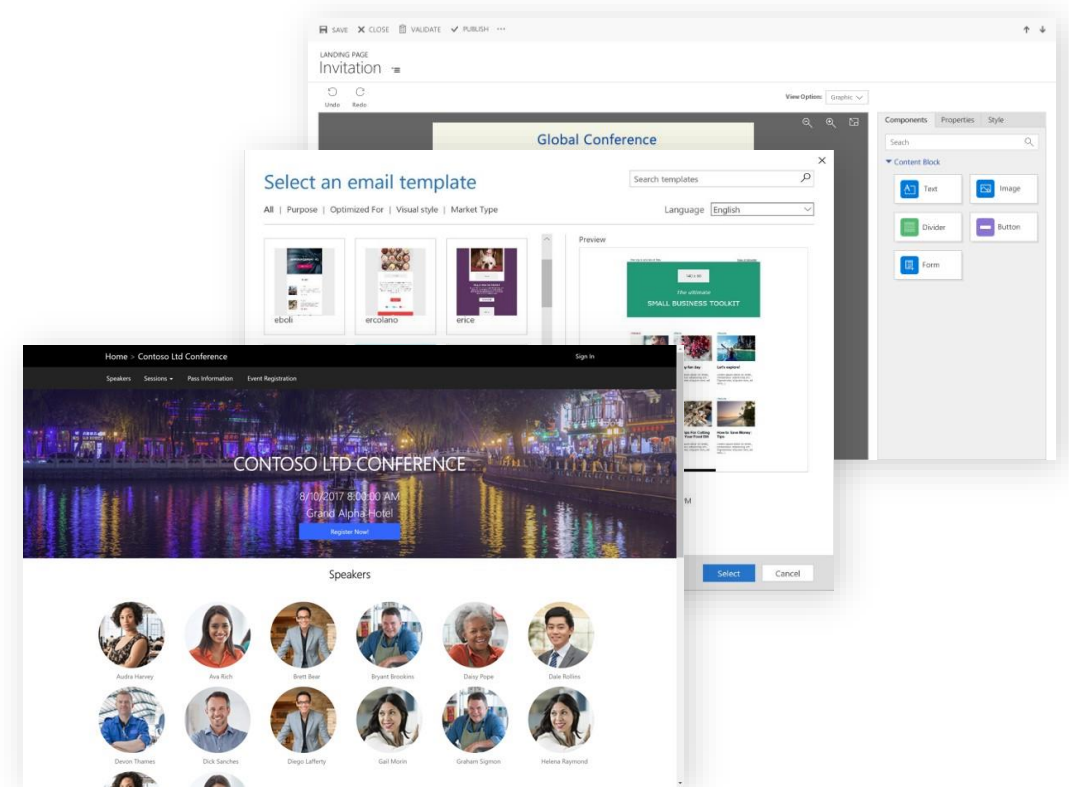
**Announcement**  
Created by: SYSTEM  
Last modified: 2/9/2018 5:24 PM  
Purpose: Announcement  
Recurring: No  
Description: Send an announcement to your customers with marketing links. Clickers are sent a follow up email and can be saved to a segment.

# 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



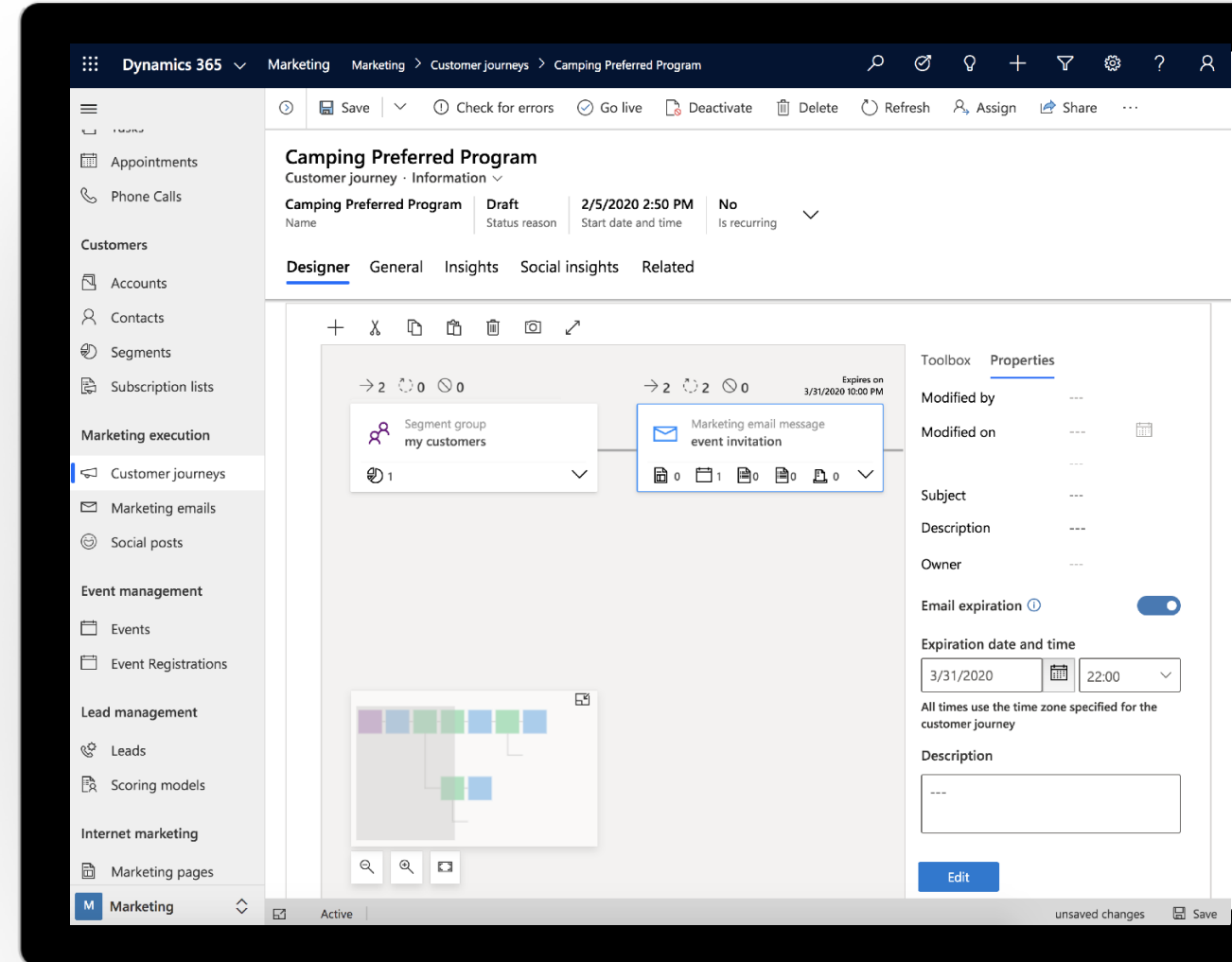
# Enhanced customer journey experience

## 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





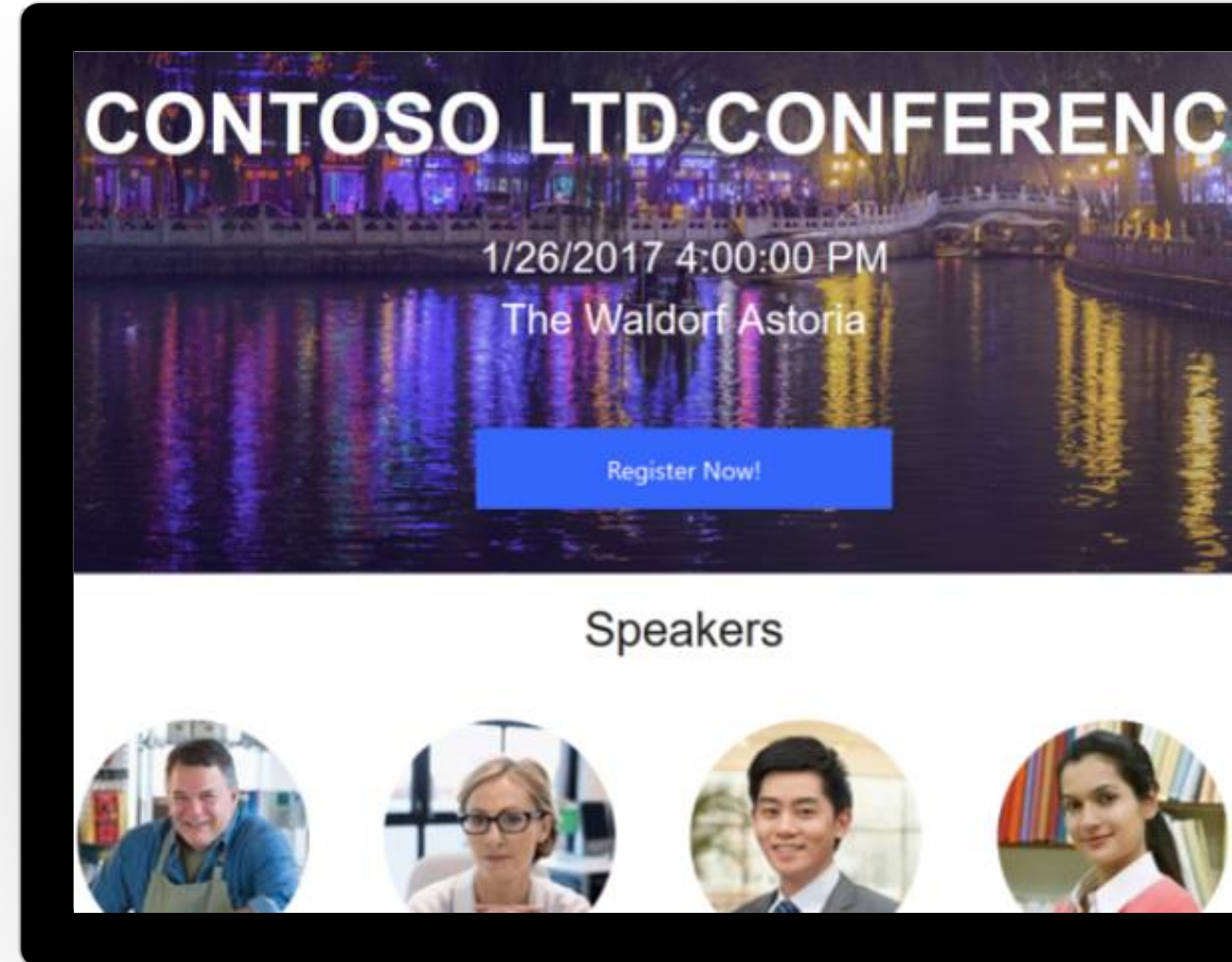
# Simplify event management

## Full set of organizing tools

Attendee-facing web portal and registration

Session, speaker, and logistics management capabilities

Integration with ON24 and other webinar providers

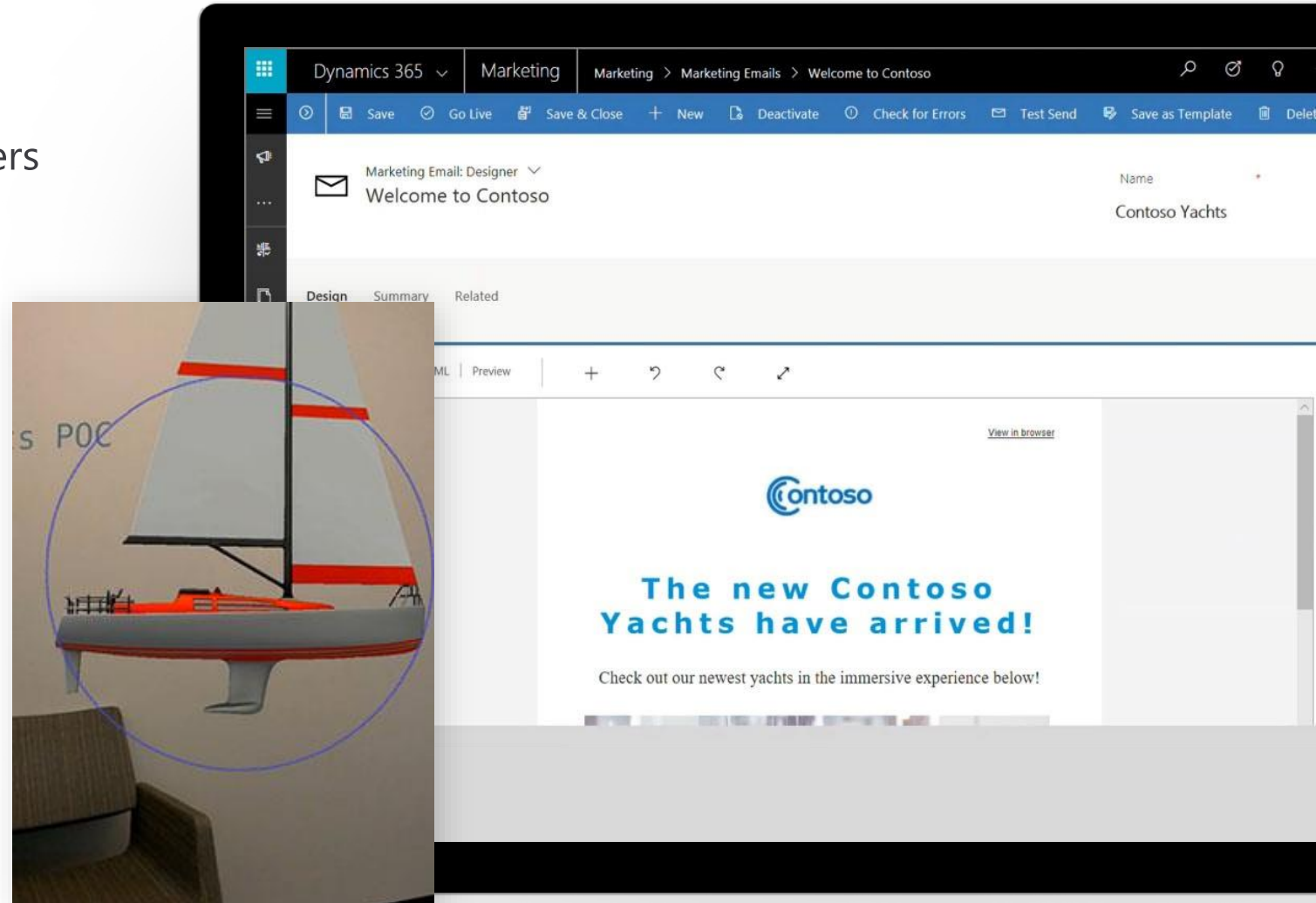


The screenshot displays a registration page for the 'CONTOSO LTD CONFERENCE'. The background features a night view of a waterfront with colorful lights reflecting on the water. The main heading 'CONTOSO LTD CONFERENCE' is prominently displayed in white. Below the heading, the event details are listed: '1/26/2017 4:00:00 PM' and 'The Waldorf Astoria'. A blue button with the text 'Register Now!' is positioned below the details. Underneath the main banner, the word 'Speakers' is centered, followed by four circular profile pictures of the event's 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 dropdown menu shows "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 "Data" panel on the left shows volume and KPIs. A "Select a customer journey template" panel is open in the center, listing various templates. A "Toolbox" panel on the right contains various marketing and flow control elements.

Data		
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 %

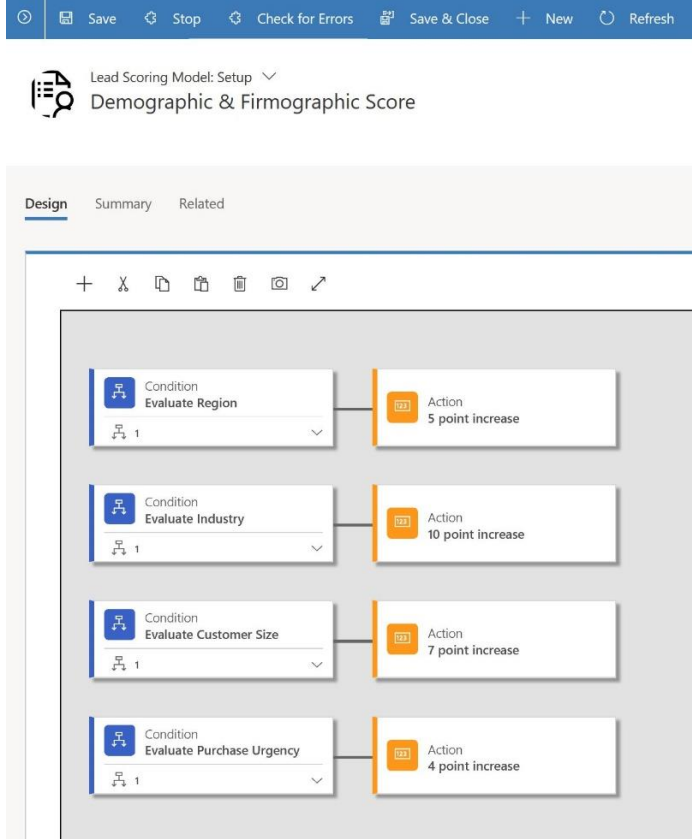
Select a customer journey template		
Name	Status	Contacts
Announcement	SYSTEM	
Blank Template	SYSTEM	
CJ		Demo Marketing
Customer Onboarding	SYSTEM	
Event Marketing	SYSTEM	
High Touch Marketing	SYSTEM	
Monthly Newsletter	SYSTEM	
Simple Email Journey	SYSTEM	

Toolbox:

- Content: Marketing Email Message, Marketing Page, Event, Survey
- Actions: Activity, Launch Workflow
- Targets: Segment, Record Updated
- Flow Control: Scheduler, Trigger, Splitter, Splitter Branch

# 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 workspace. The workspace contains four rows, each representing a condition-action pair:

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

# Increase productivity

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

The screenshot displays the Dynamics 365 Marketing interface for Customer Journeys. The top navigation bar shows 'Dynamics 365' and 'Marketing', with a breadcrumb trail 'Marketing > Customer Journeys'. A secondary toolbar includes actions like 'Show Chart', 'New', 'Delete', 'Refresh', 'Email a Link', 'Flows', 'Export to Excel', and 'Import from Excel'. The main content area is titled 'Active Customer Journeys' and features a 'Calendar' view for May 2018. The calendar grid shows various marketing events and campaigns as horizontal bars across days:

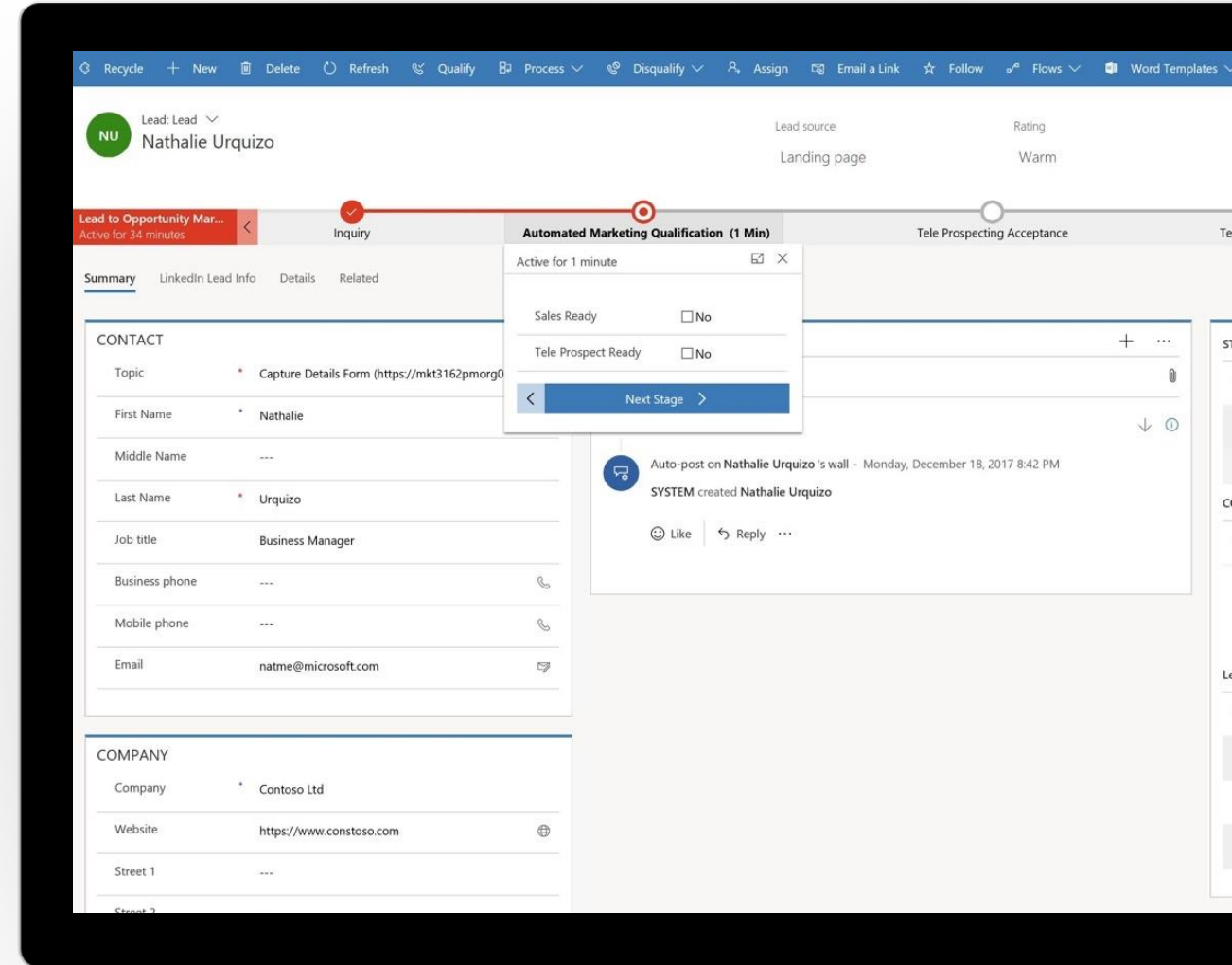
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
29	30 Contoso Awareness conference	May 1	2 saurav campaign	3	4
6	7	8 Journey 6xv (Event marketing)	9	10	11
13	14	15	16	17	18
		Journey uut (Simple email journey)			
20	21 New product announcement (Event marketing) Admin newsletter	22	23	24	25
27	28	29 Partner event	30 Overview webinar	31	June 1 Saturday VIP



# 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

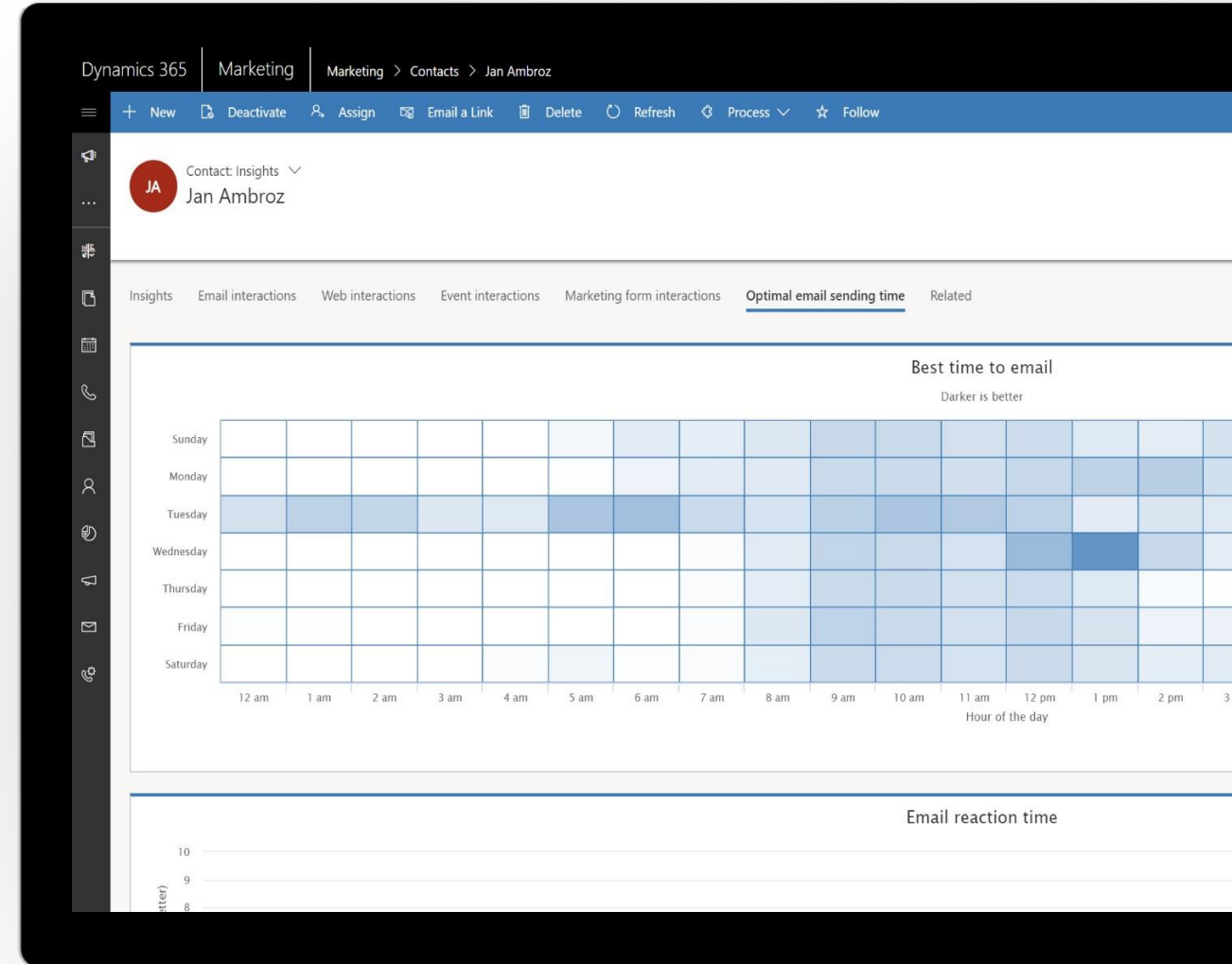


# Test and choose the right content

Built-in A/B testing with the ability to include fully rendered dynamic content

Send messages at the right time with automated scheduler

Improve open rates using spam score



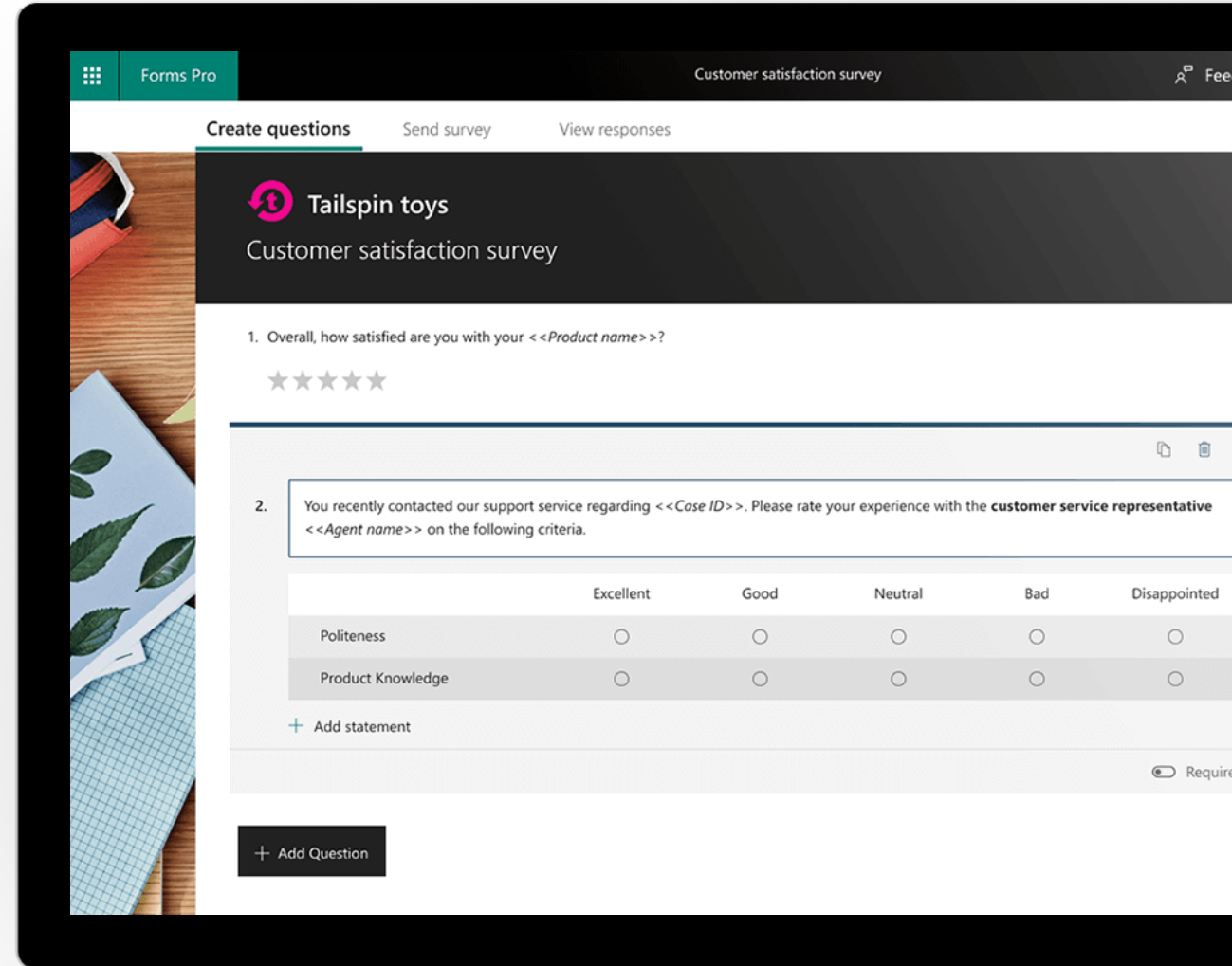


# Better understand customer needs

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



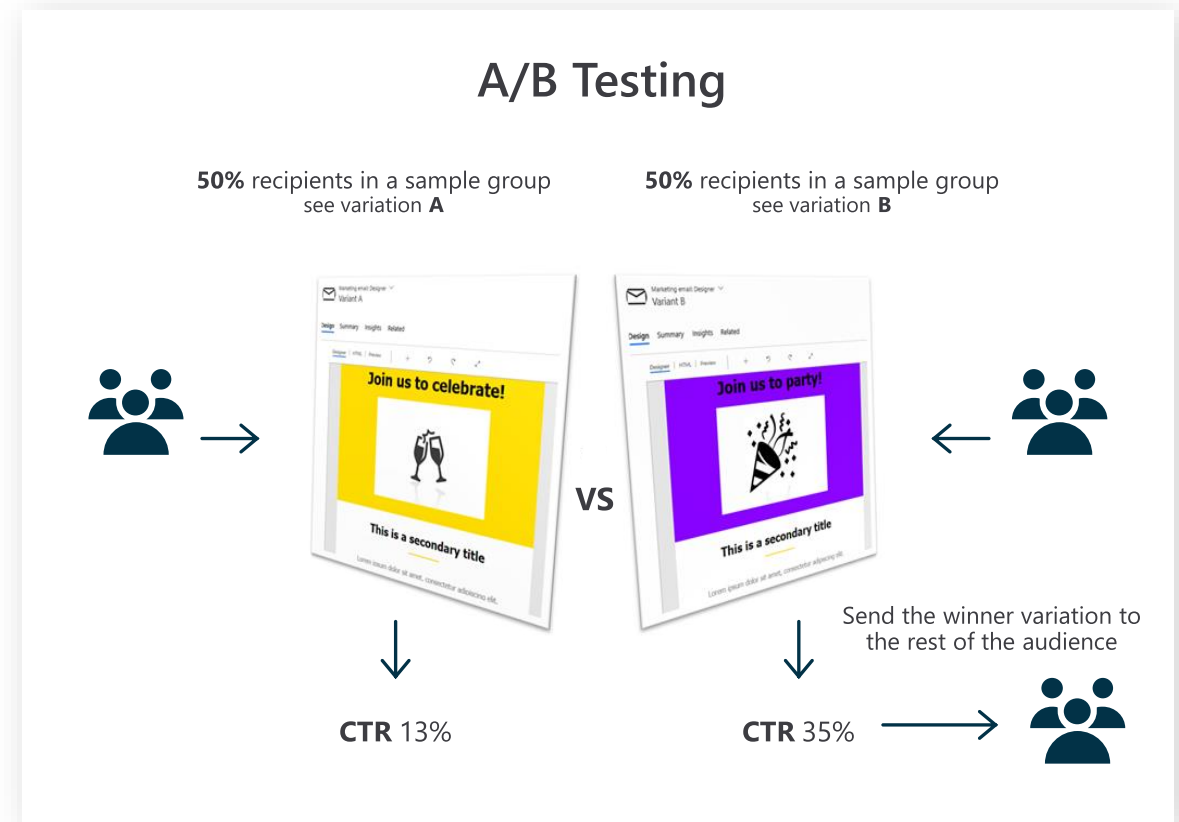
# Target the right audience

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

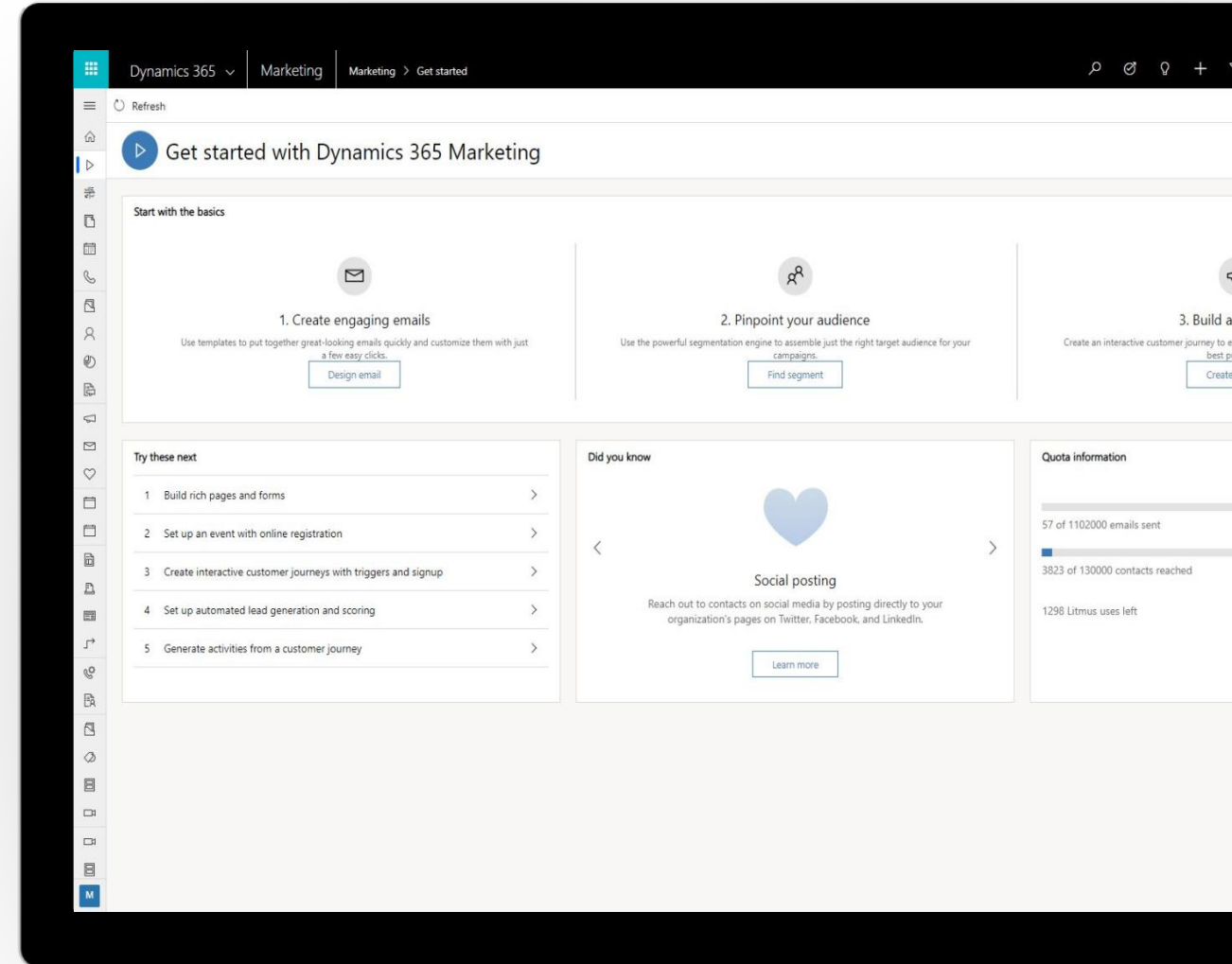
Set up multiple lead-scoring models to enrich customer engagements



**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

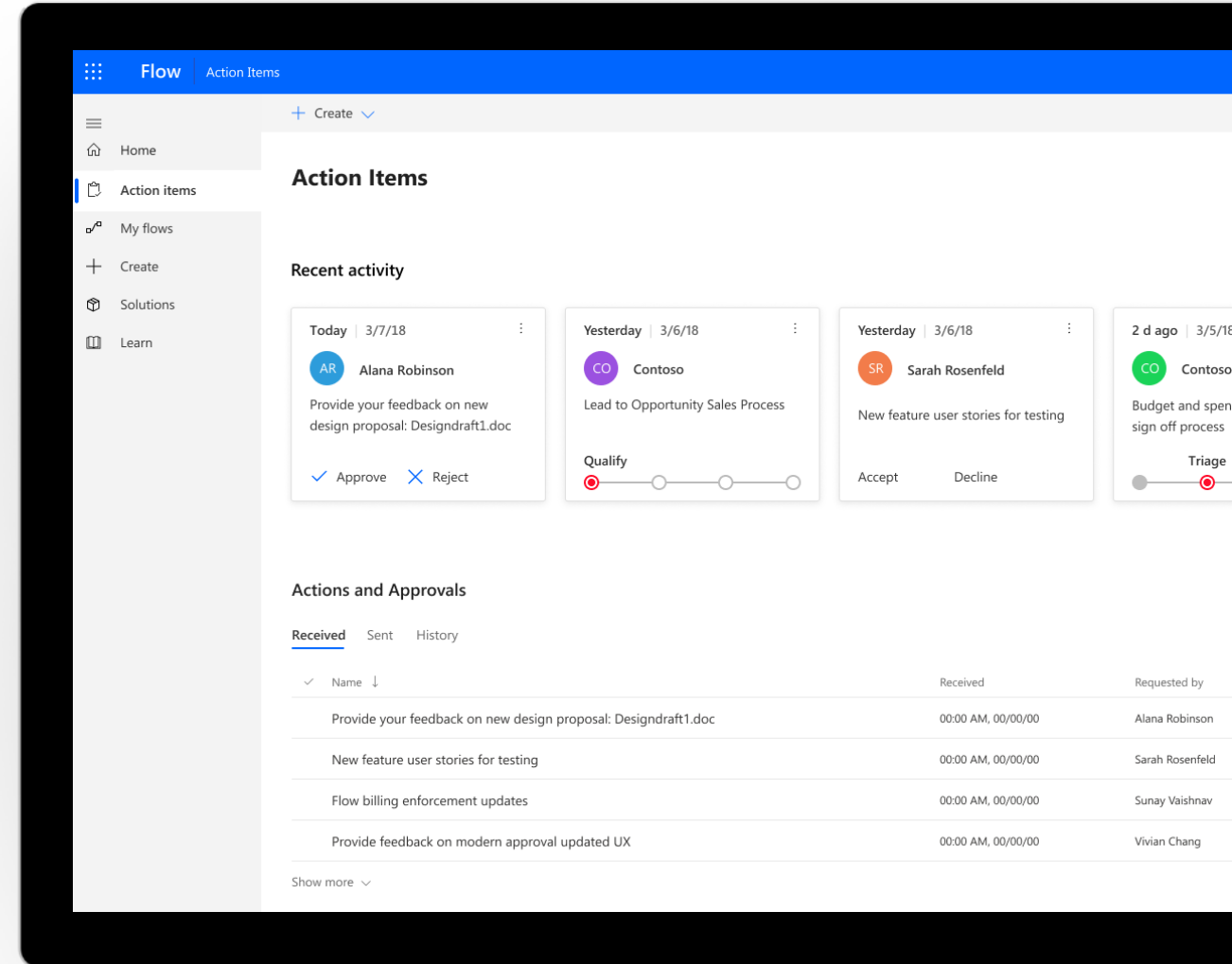




# Easily integrate data

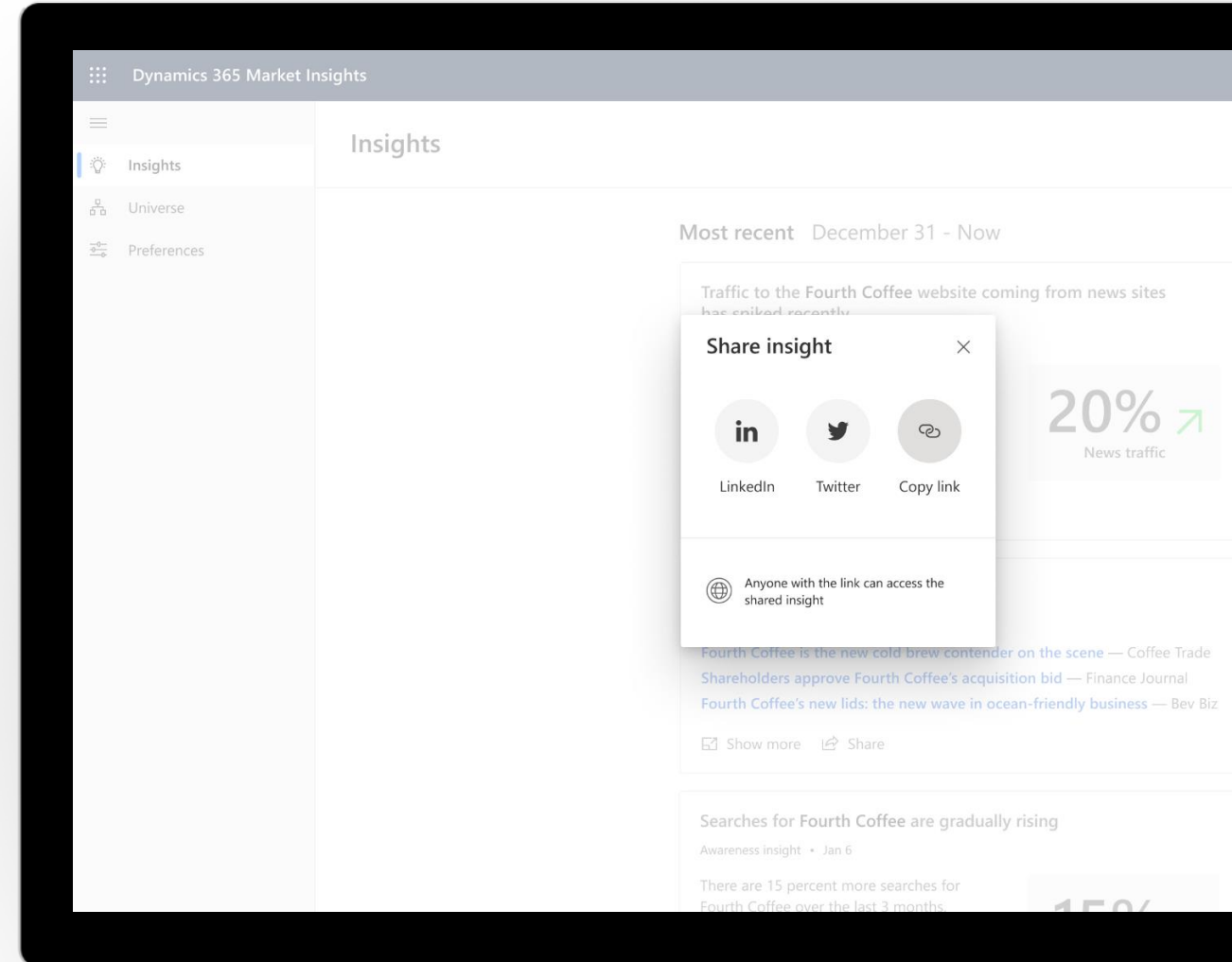
Utilize data from Dynamics 365 and third-party apps and systems

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



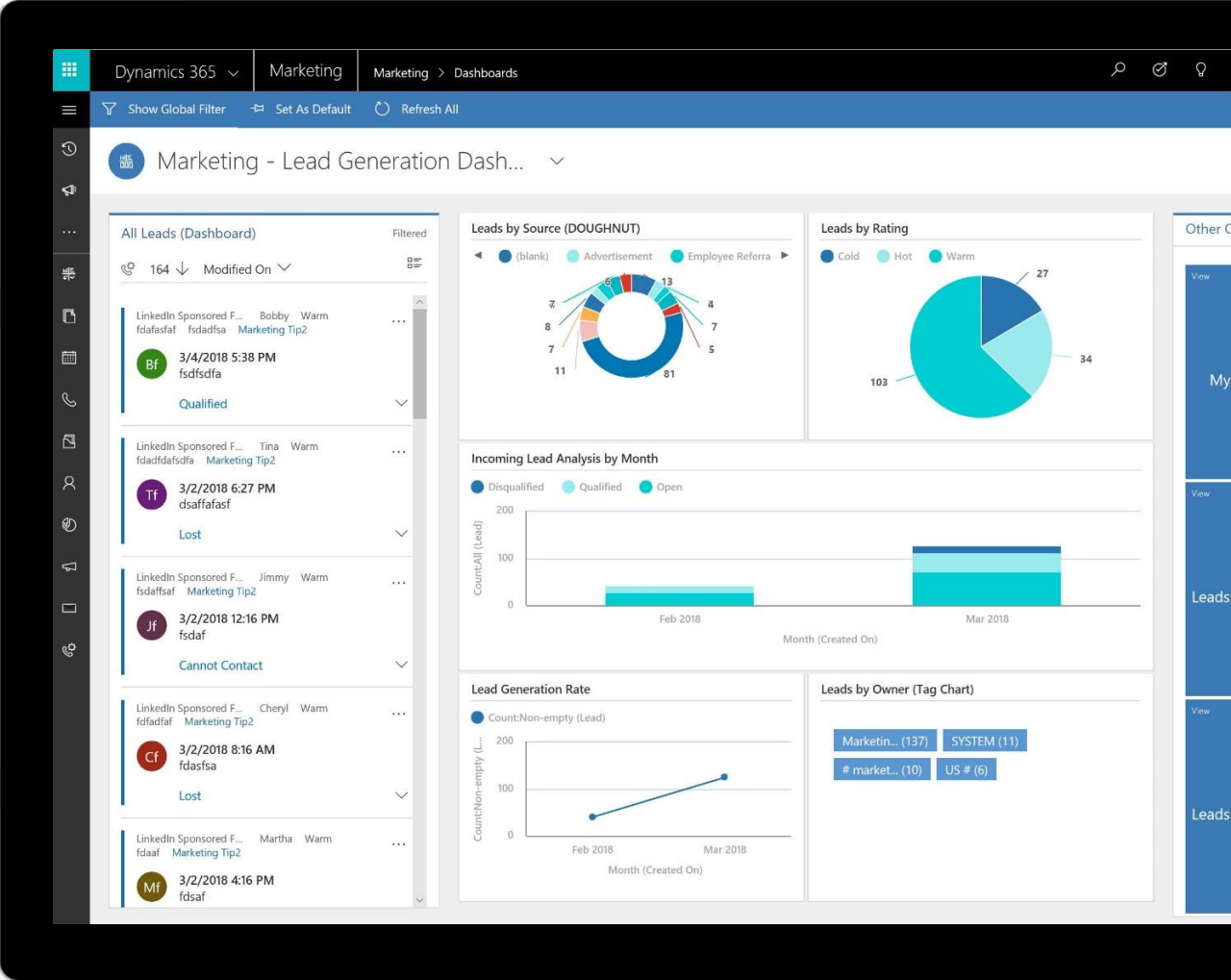
# Enhance marketing campaigns

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



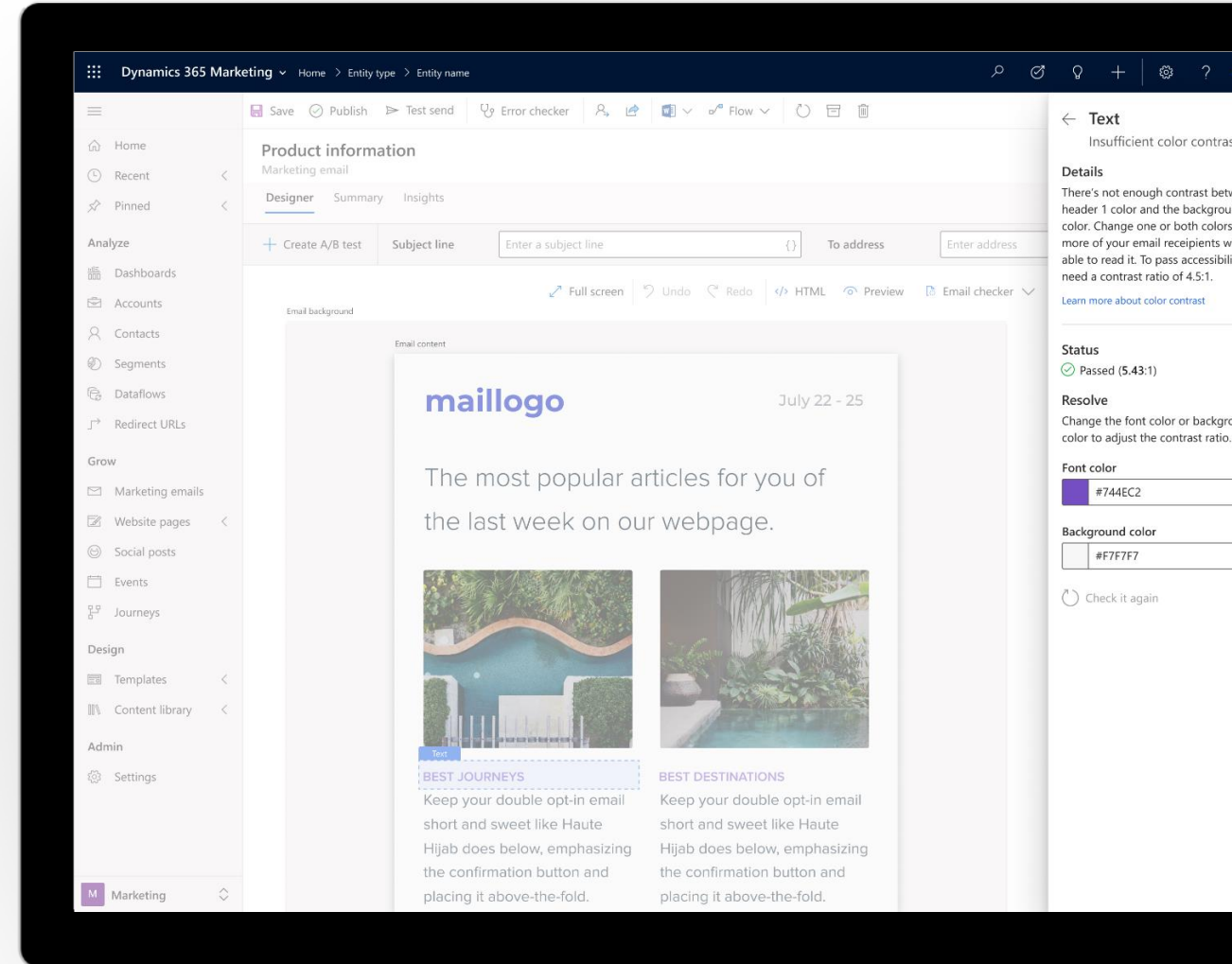
# Market globally & maintain compliance

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





# Take the next step



Connect with Microsoft experts and Dynamics 365 partners

[Contact us](#)

