Microsoft Dynamics 365

Dynamics 365
Marketing

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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

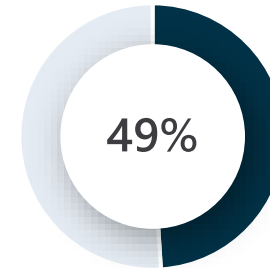Data Siloes - Separate Sales, Marketing, Service systems

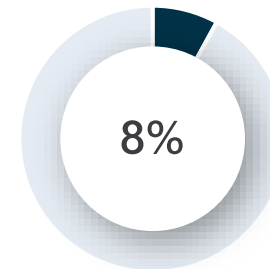Unsynchronized view of leads and contacts

Stale leads

Higher TCO due to integration and maintenance costs

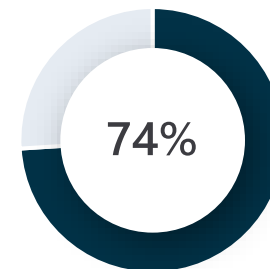Lack of robust extensibility to support the needs of complex businesses

Lack E2E experience orchestration

49%

49% of sales reps ignore more than half of marketing's leads[1]

8%

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

74%

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

[1] 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
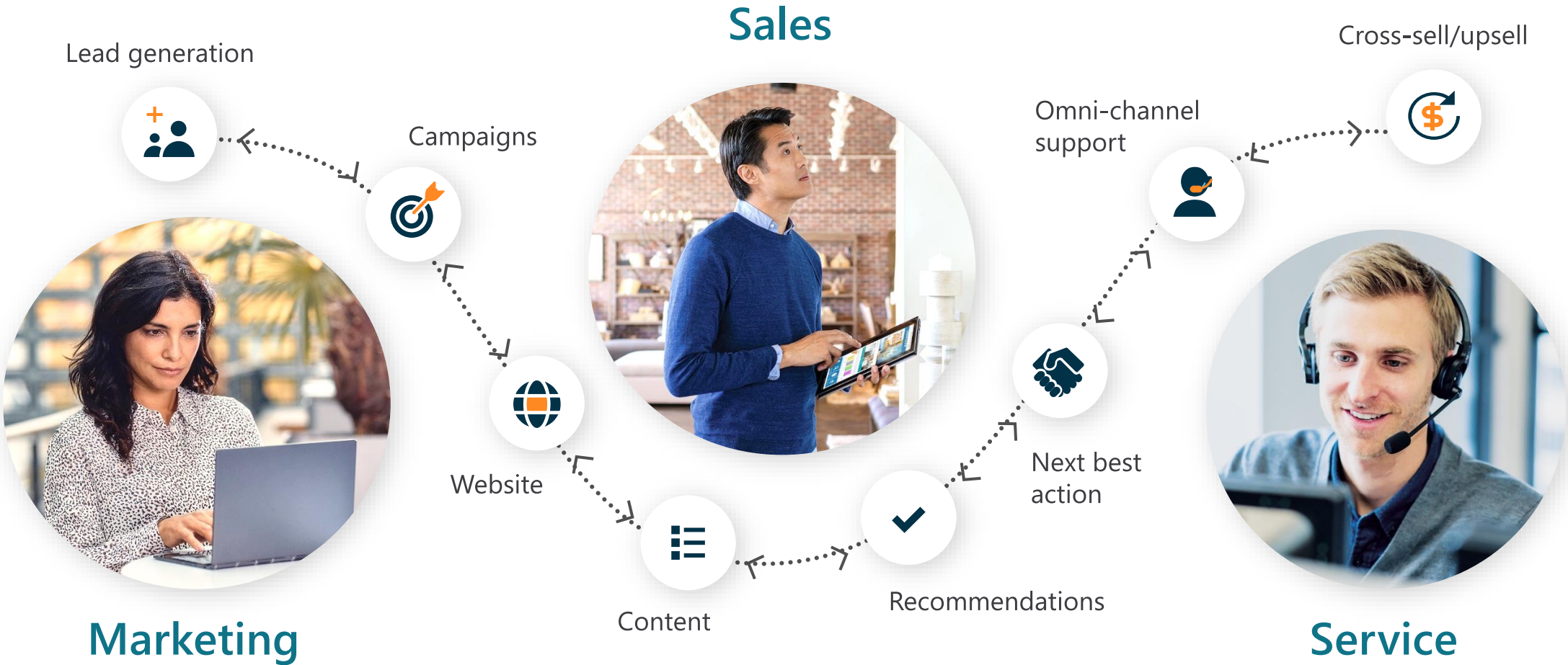
Our approach

A closer look at our current approach

CUSTOMER DATA IS EVERYWHERE
AND ITS CHANGING EVERYTHING

Power end-to-end customer experiences

Marketing

Lead generation

Campaigns

Website

Content

Sales

Recommendations

Next best action

Omni-channel support

Cross-sell/upsell

Service

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	Lead nurturing	Event management	Insights and reporting	Unified platform	AI capabilities
Email marketing with A/B testing and Send Now	Customer journey designer and orchestration	Events portal	360-degree view of leads and contacts	Integration with content management systems	Automated scheduler
Landing pages, forms and website personalization	Dynamics Customer Insights integration	Sessions, speaker, and venue management	Customer Interactions insights	Sales integration and collaboration	Spam score
Reusable content blocks and videos	Dynamic segmentation and multiple lead scoring	Registration and attendance tracking	Surveys with Microsoft Forms Pro	Easier set up	
LinkedIn and social integration	Account-based marketing	QR codes and wait listing	Advanced and custom analytics with Power BI	Approvals with Microsoft Power Automate	
Marketing support for Business units	Lead lifecycle with automated business process flows	Webinars integration		Extensibility for campaigns and segments	
Marketing calendar					

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
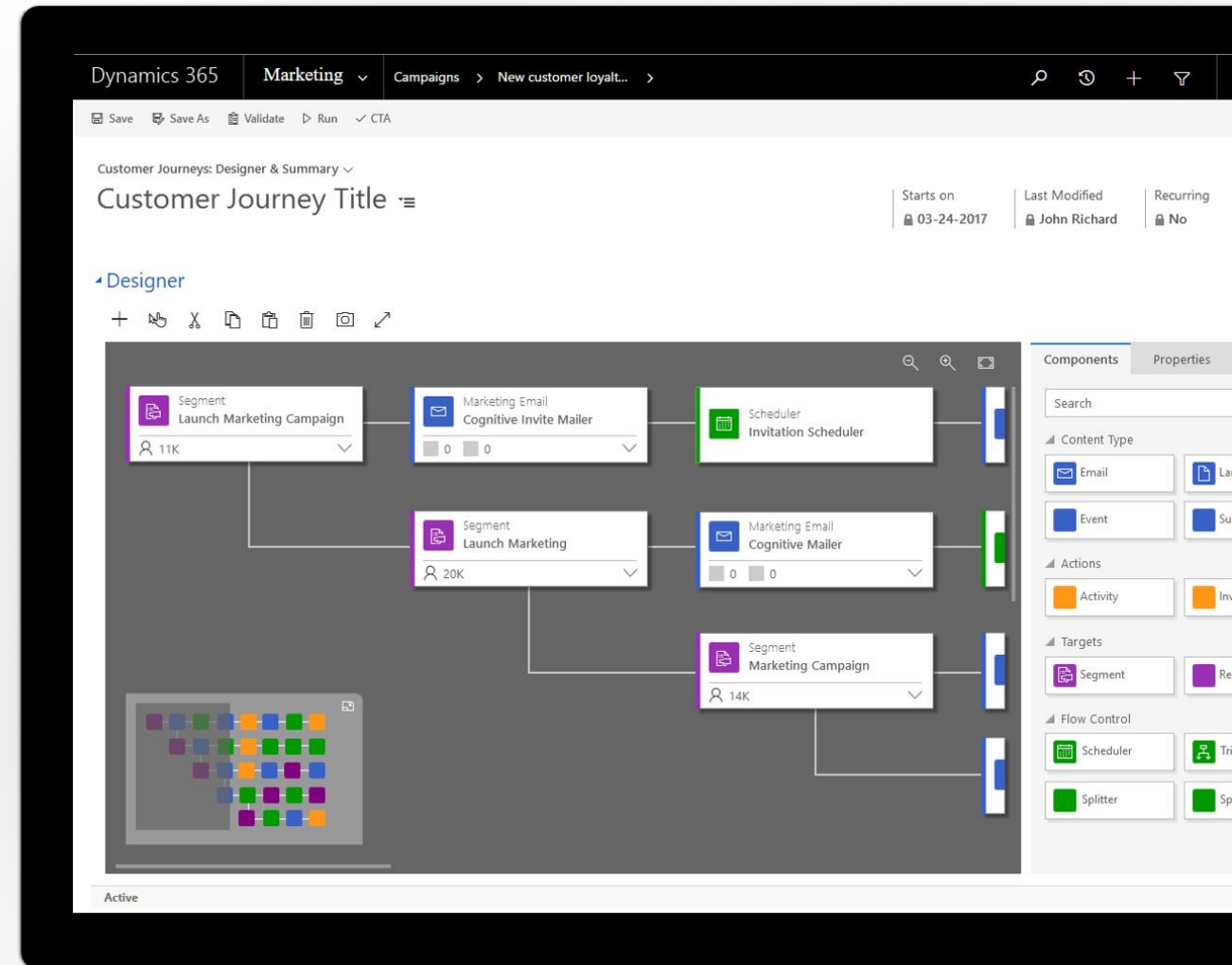
Orchestrate customer journeys

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
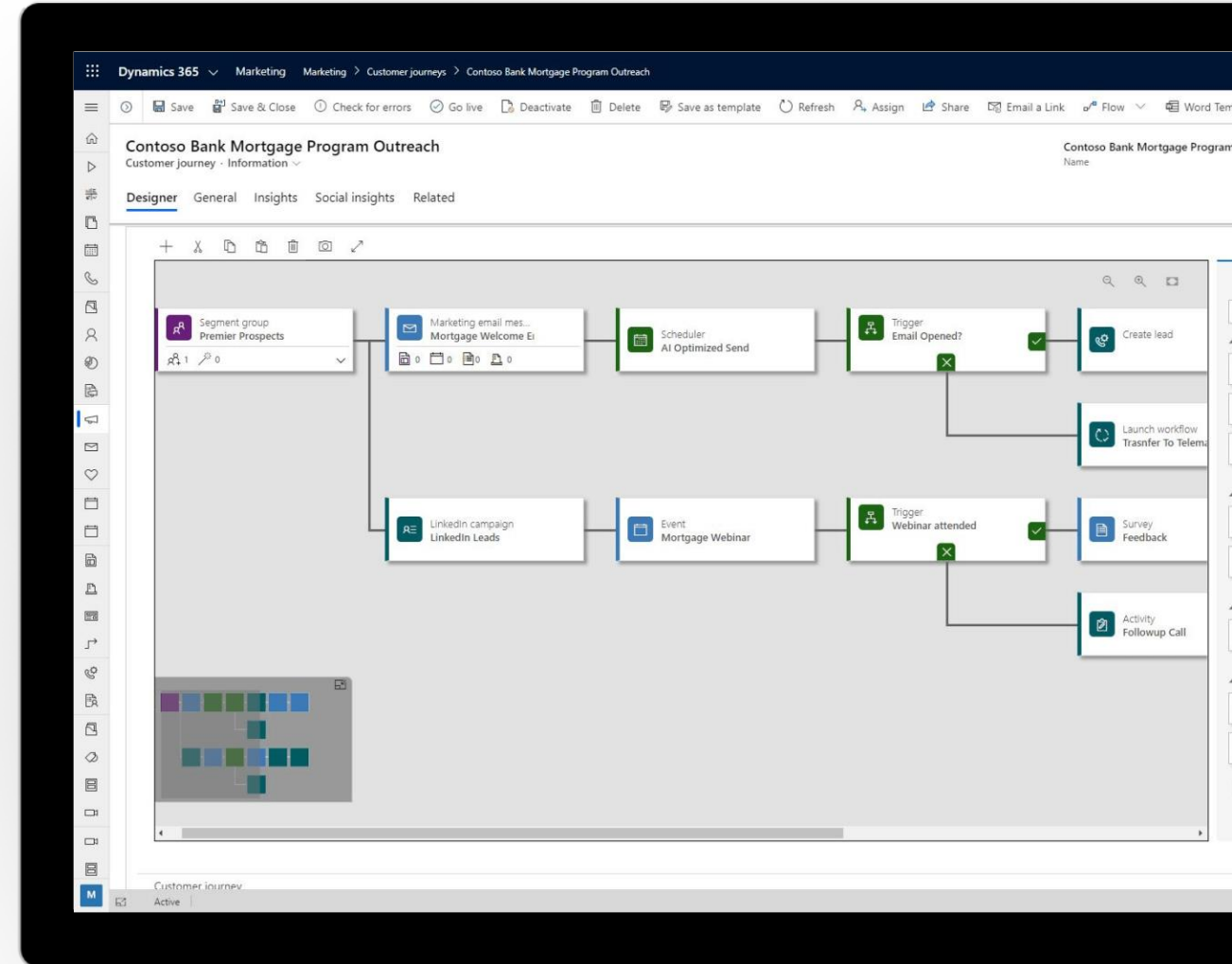
Align sales and marketing

Create a single view of prospects

Identify, target, and close top accounts

Track and prioritize leads

Increase productivity

Simplify collaboration

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.
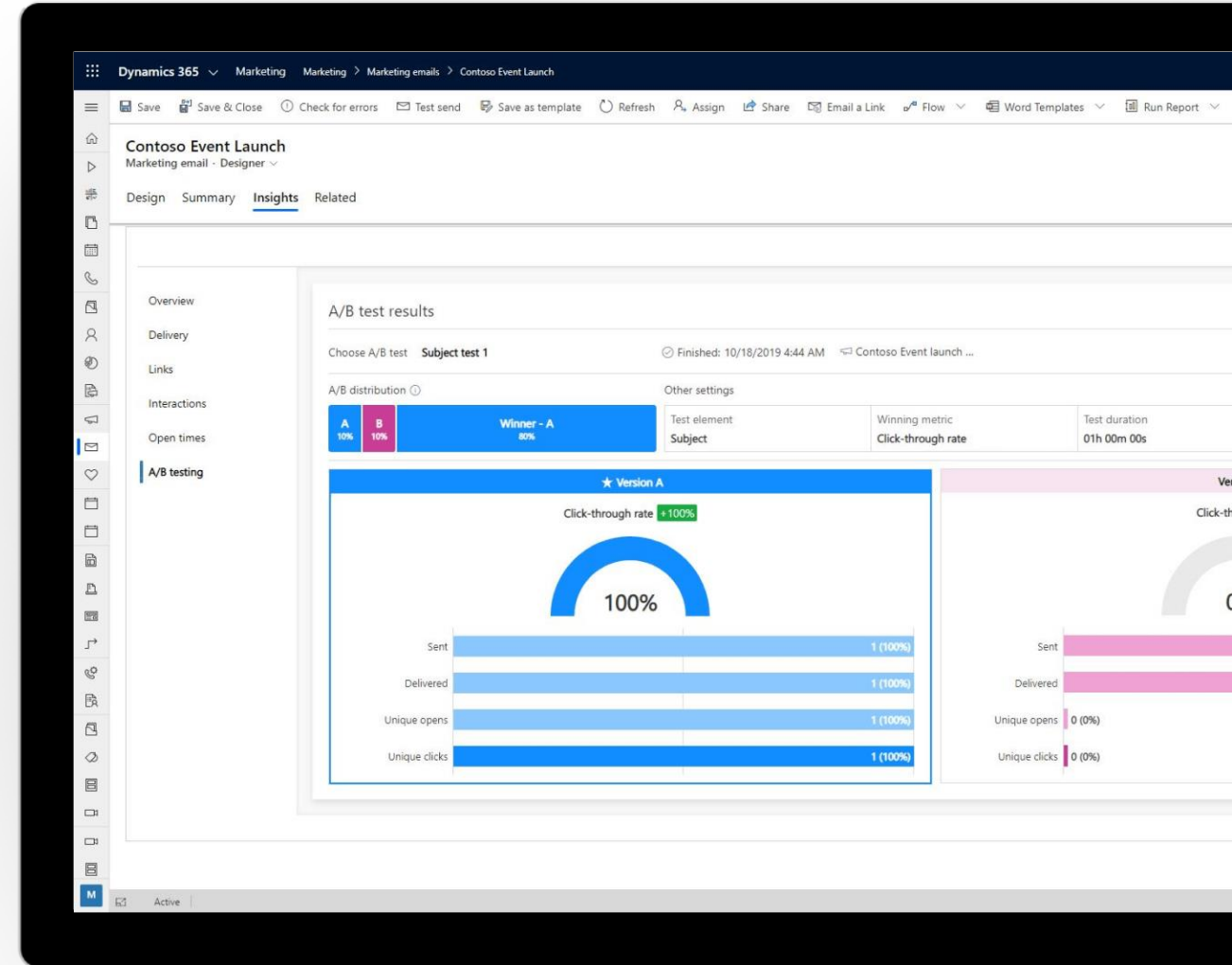
Grow with an adaptable platform

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
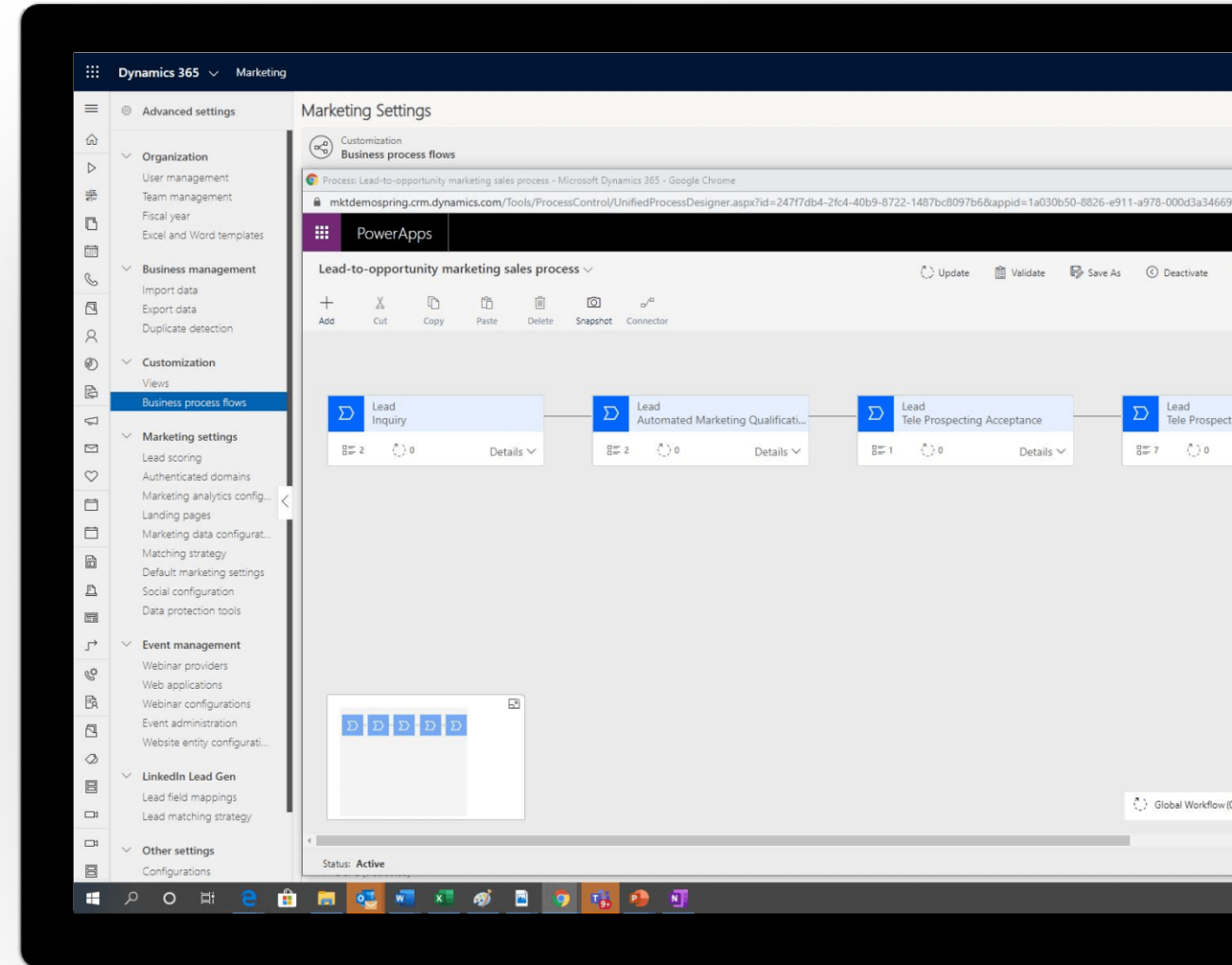
Orchestrate Customer journeys

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.

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
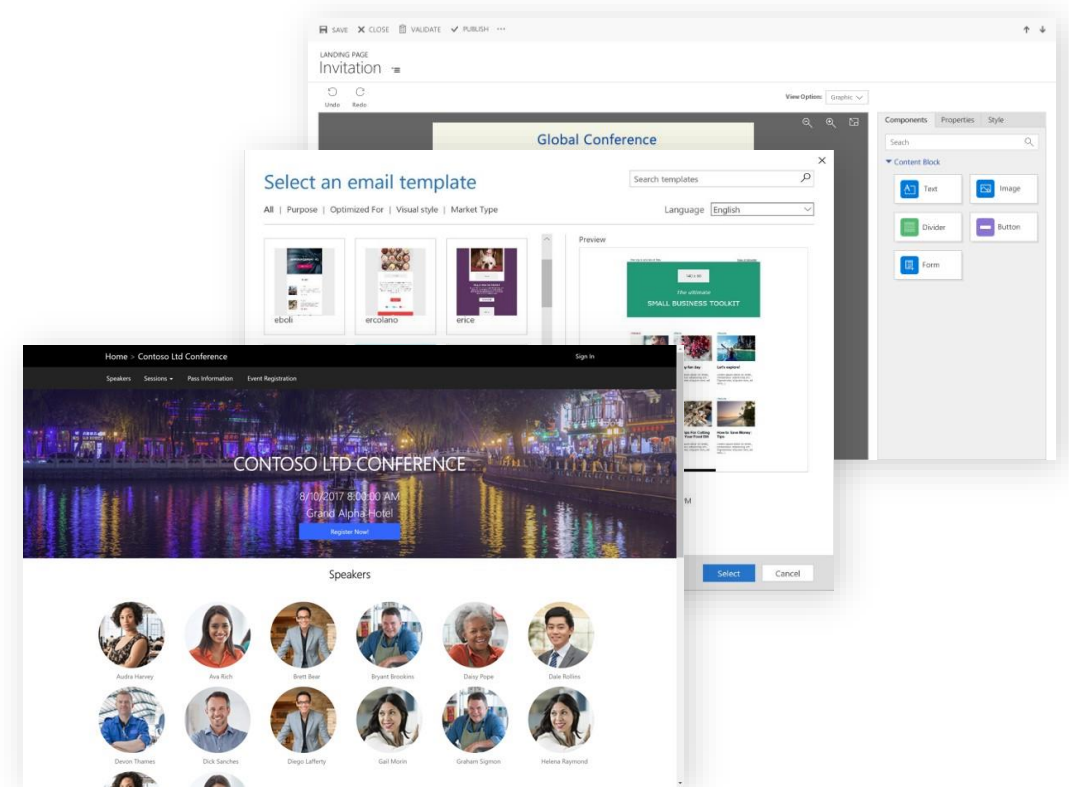
Enhanced customer journey experience

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
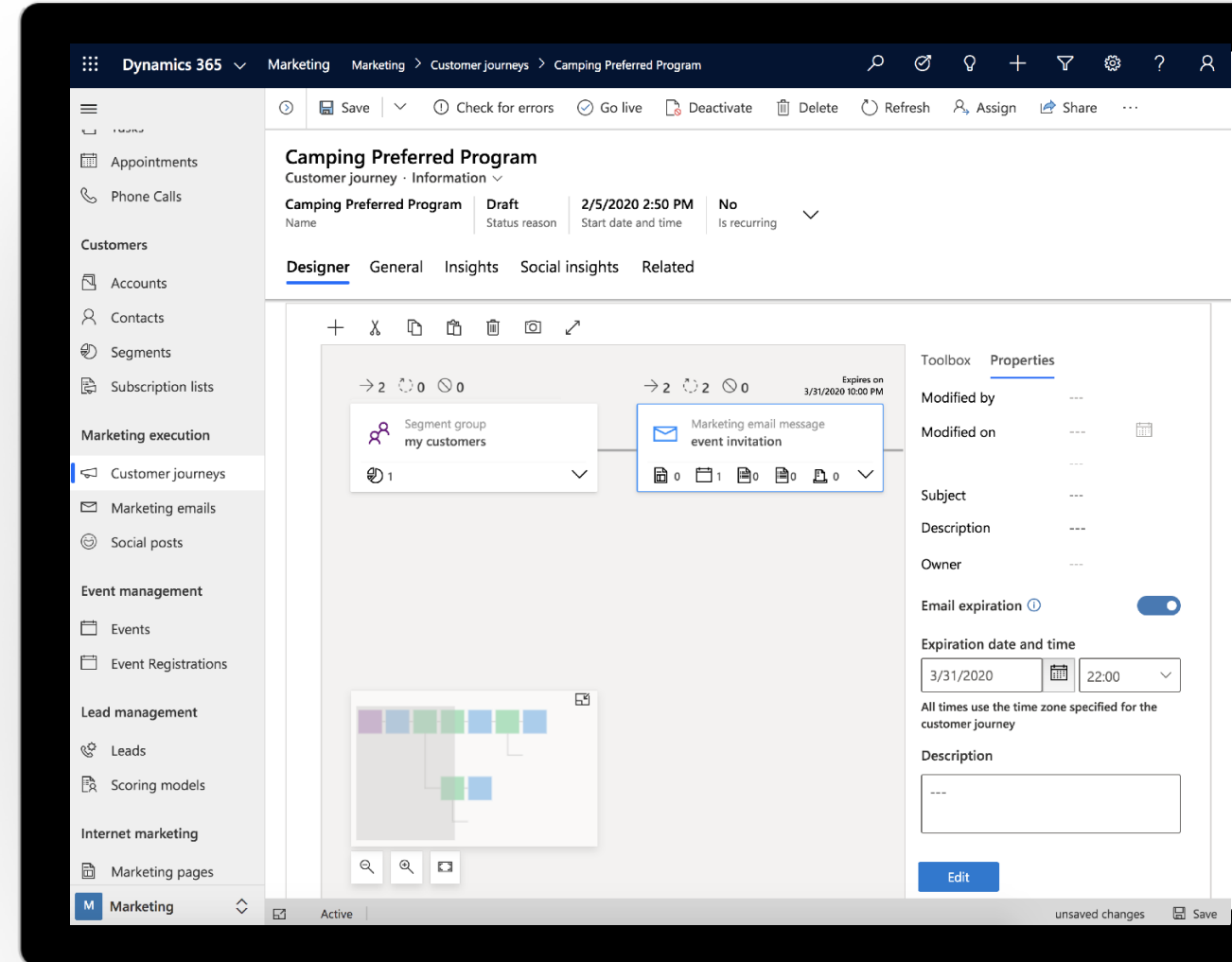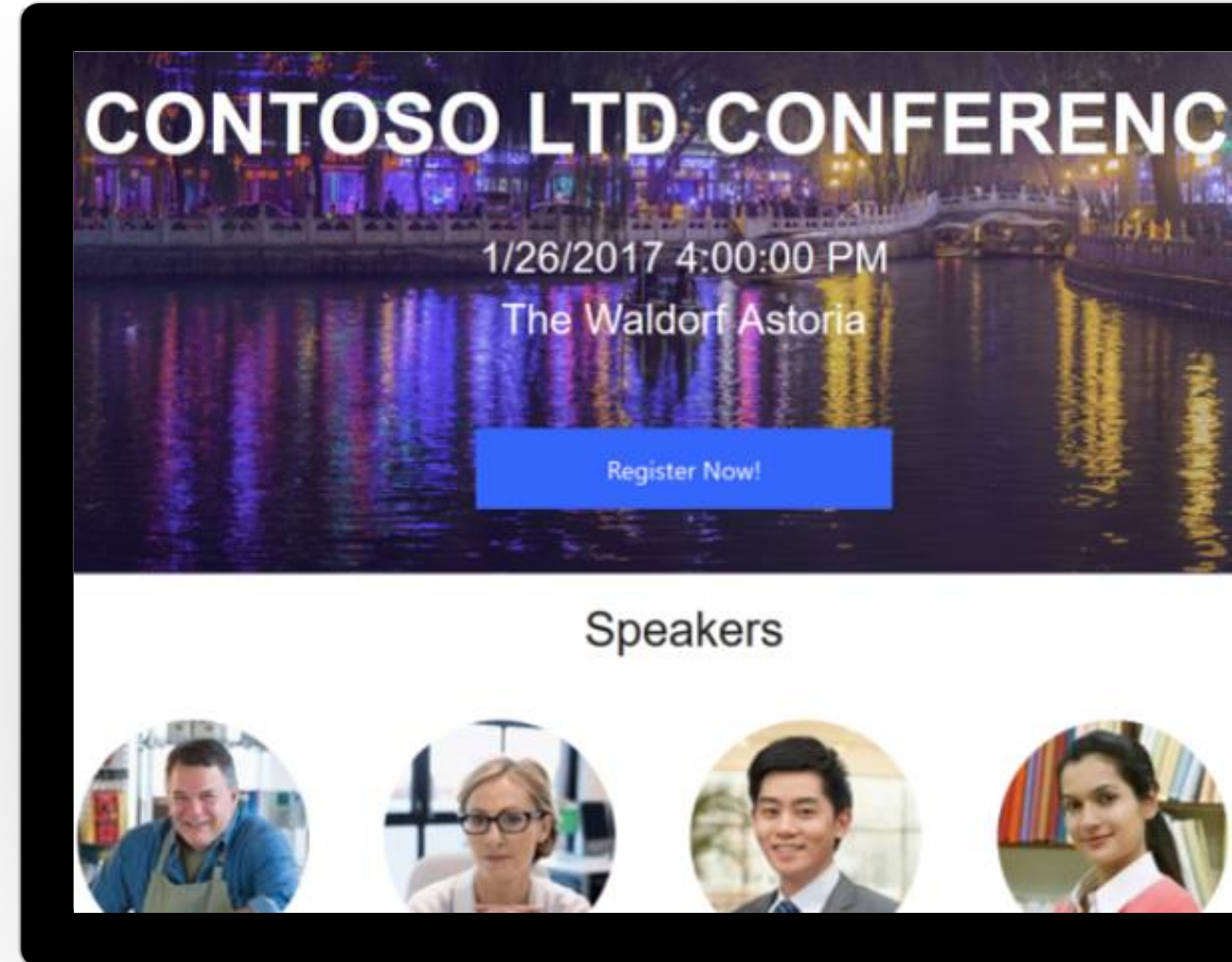
Simplify event management

Full set of organizing tools

Attendee-facing web portal and registration

Session, speaker, and logistics management capabilities

Integration with ON24 and other webinar providers

Align sales and marketing

Create a single view of prospects

Unify data across contacts, leads, and customers through seamless integration with
Dynamics 365 Sales
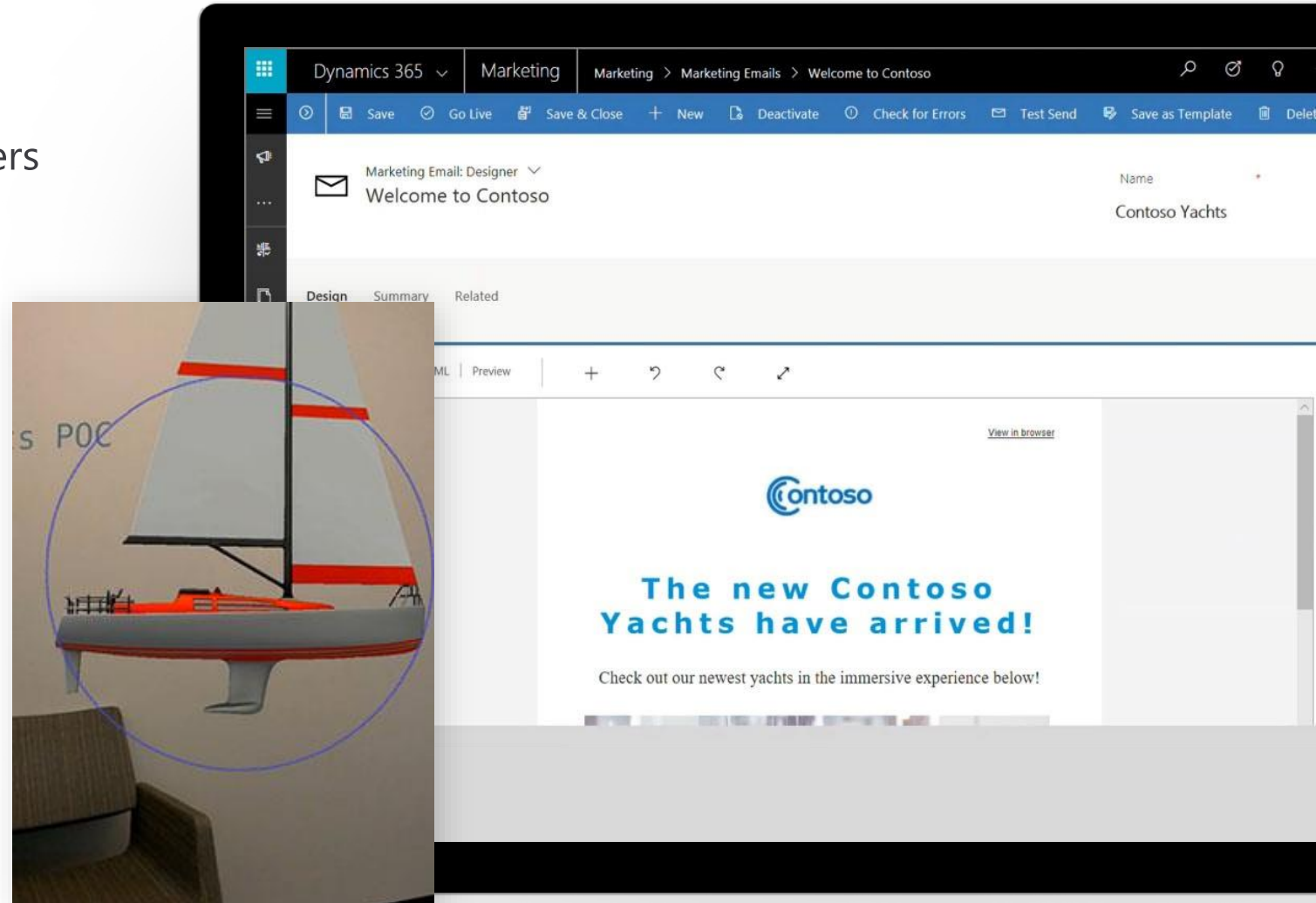
Identify, target, and close top accounts

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

Track and prioritize leads

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

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
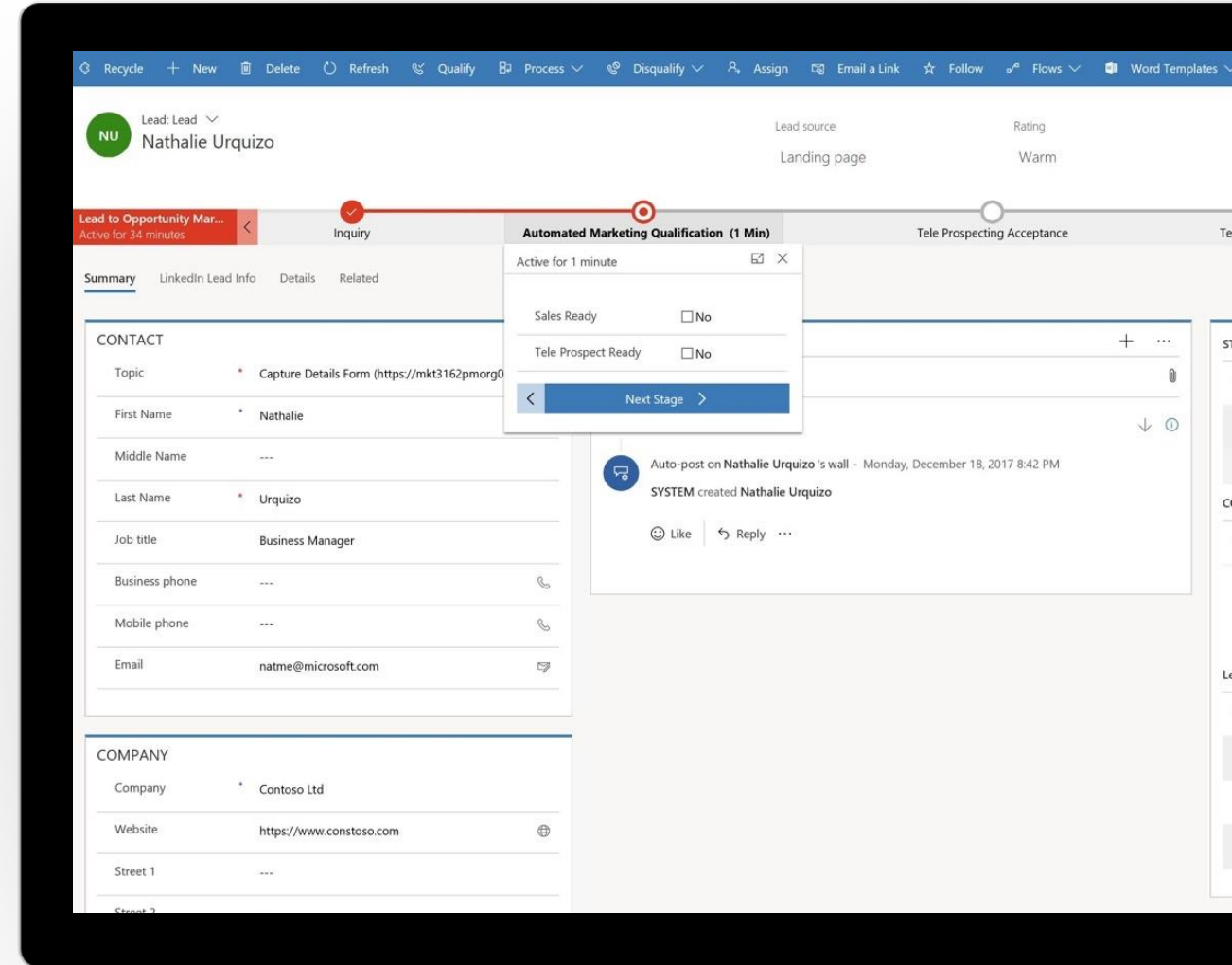
Make
informed decisions

Improve marketing effectiveness

Get efficiency advantage of pre-built dashboards and marketing analyzers – or build your own custom dashboards
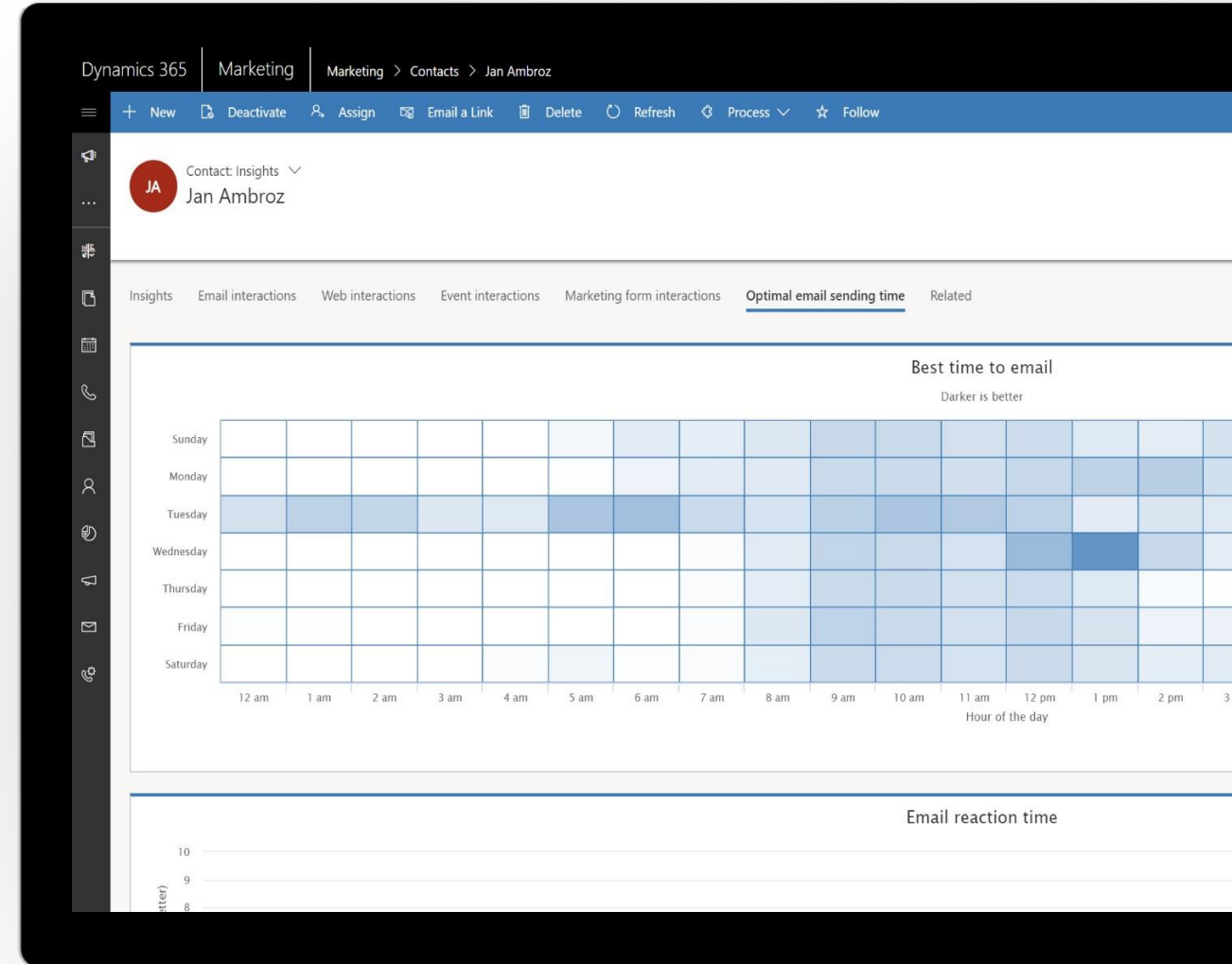
Test and choose the right content

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

Send messages at the right time with automated scheduler
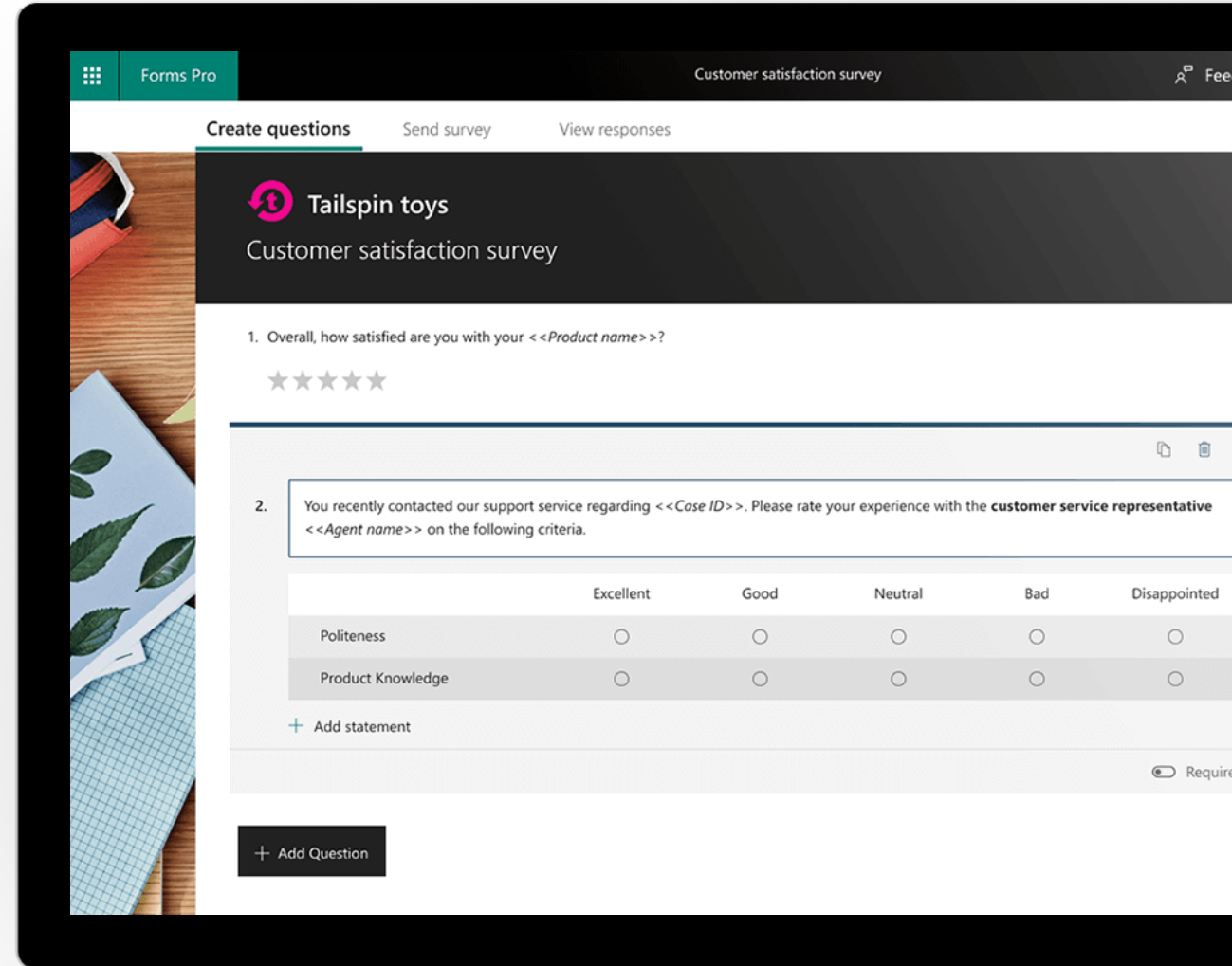
Improve open rates using spam score

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
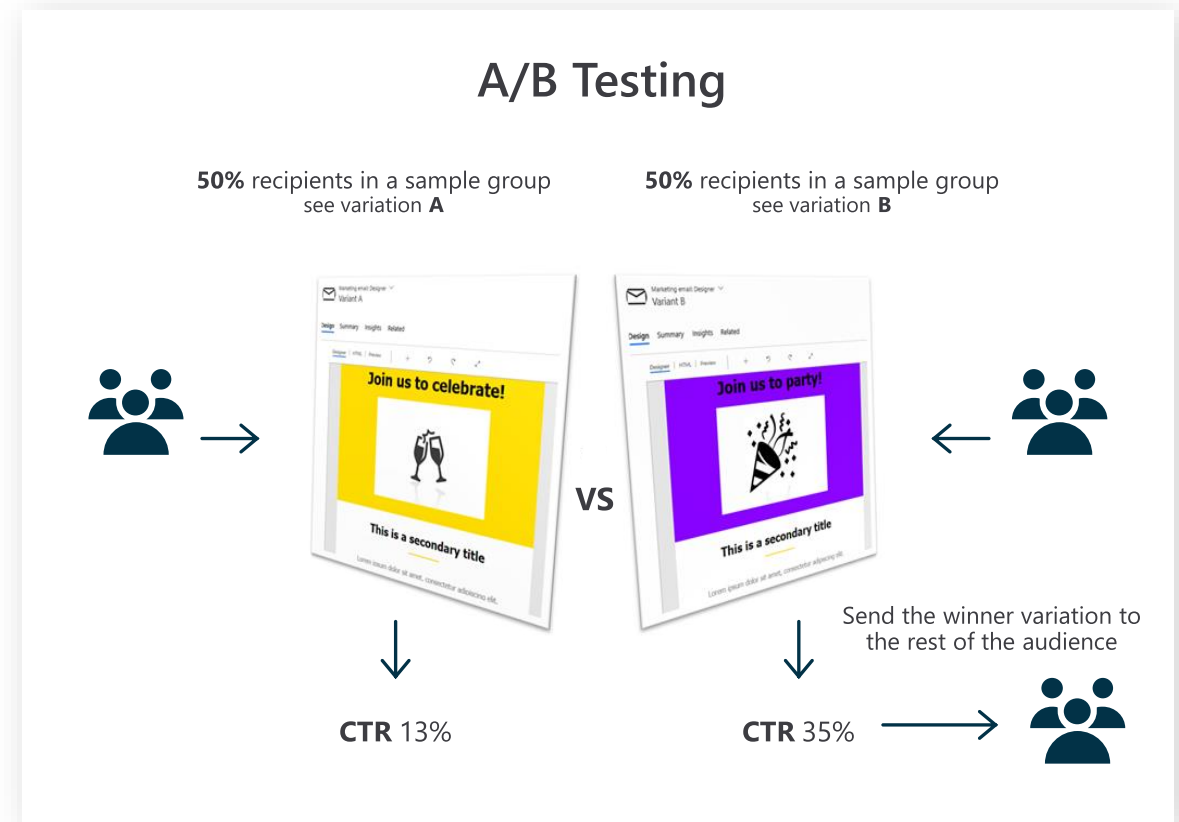
Target the right audience

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

A/B Testing

50% recipients in a sample group see variation **A**

50% recipients in a sample group see variation **B**

VS

Send the winner variation to the rest of the audience

CTR 13%

CTR 35%

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
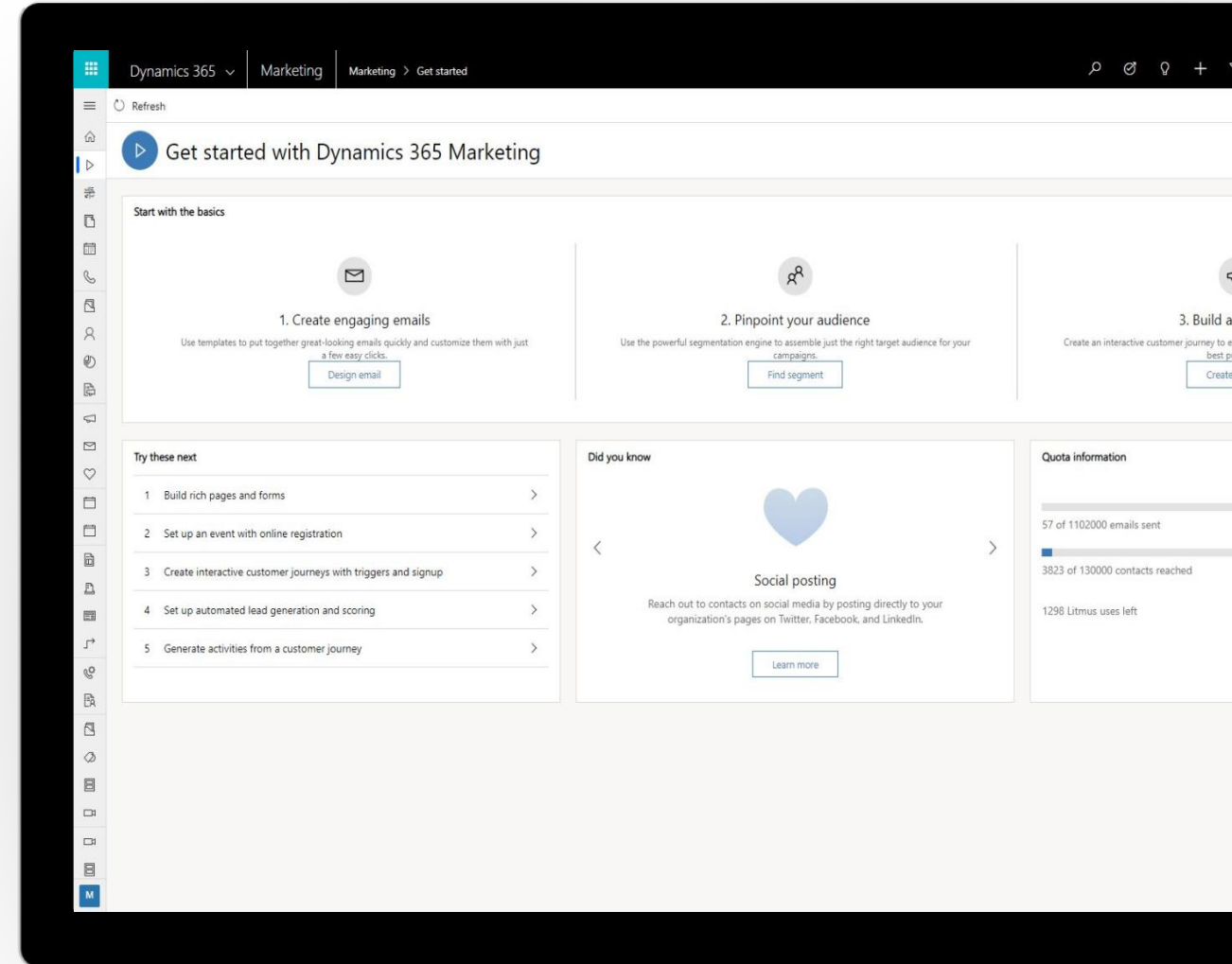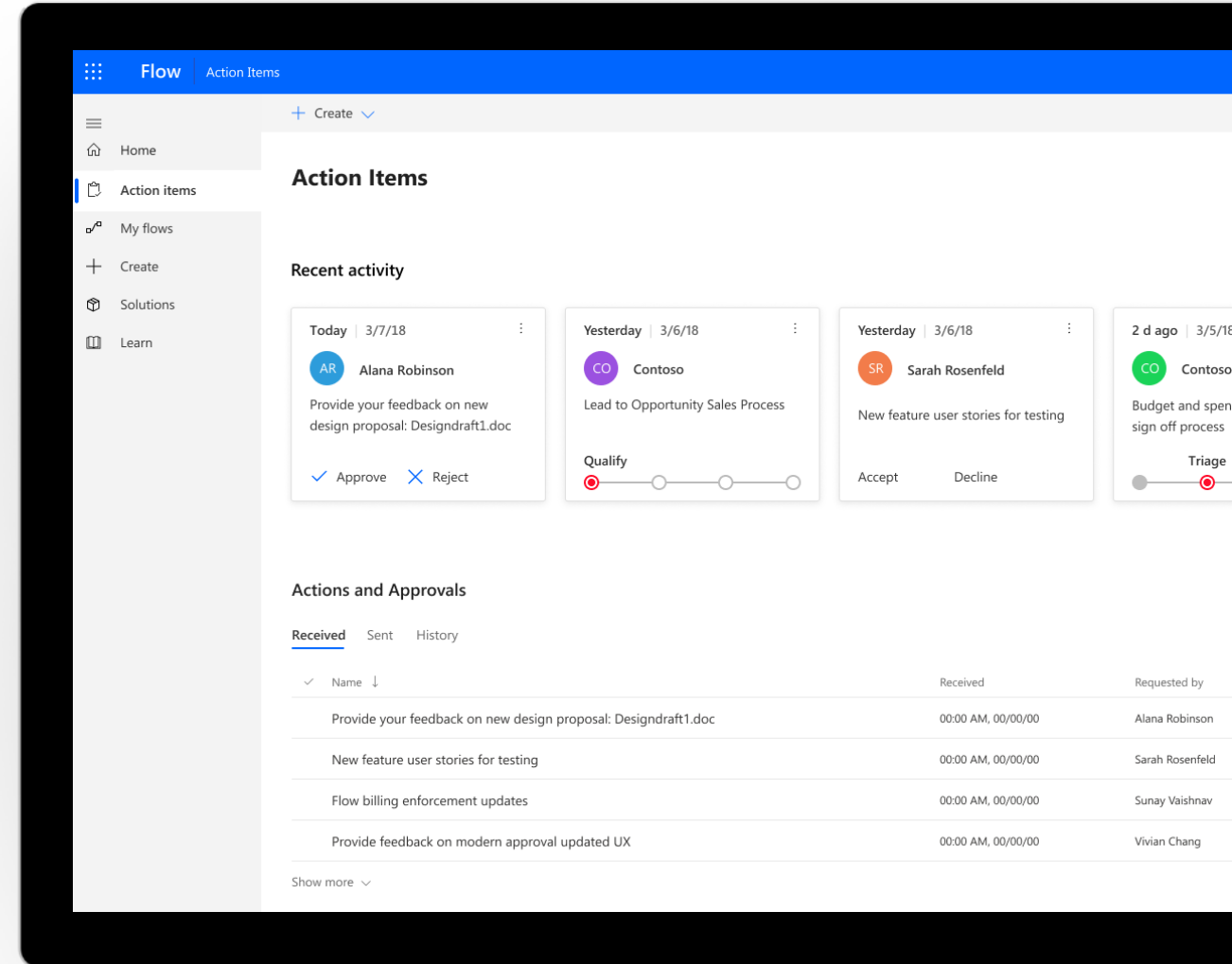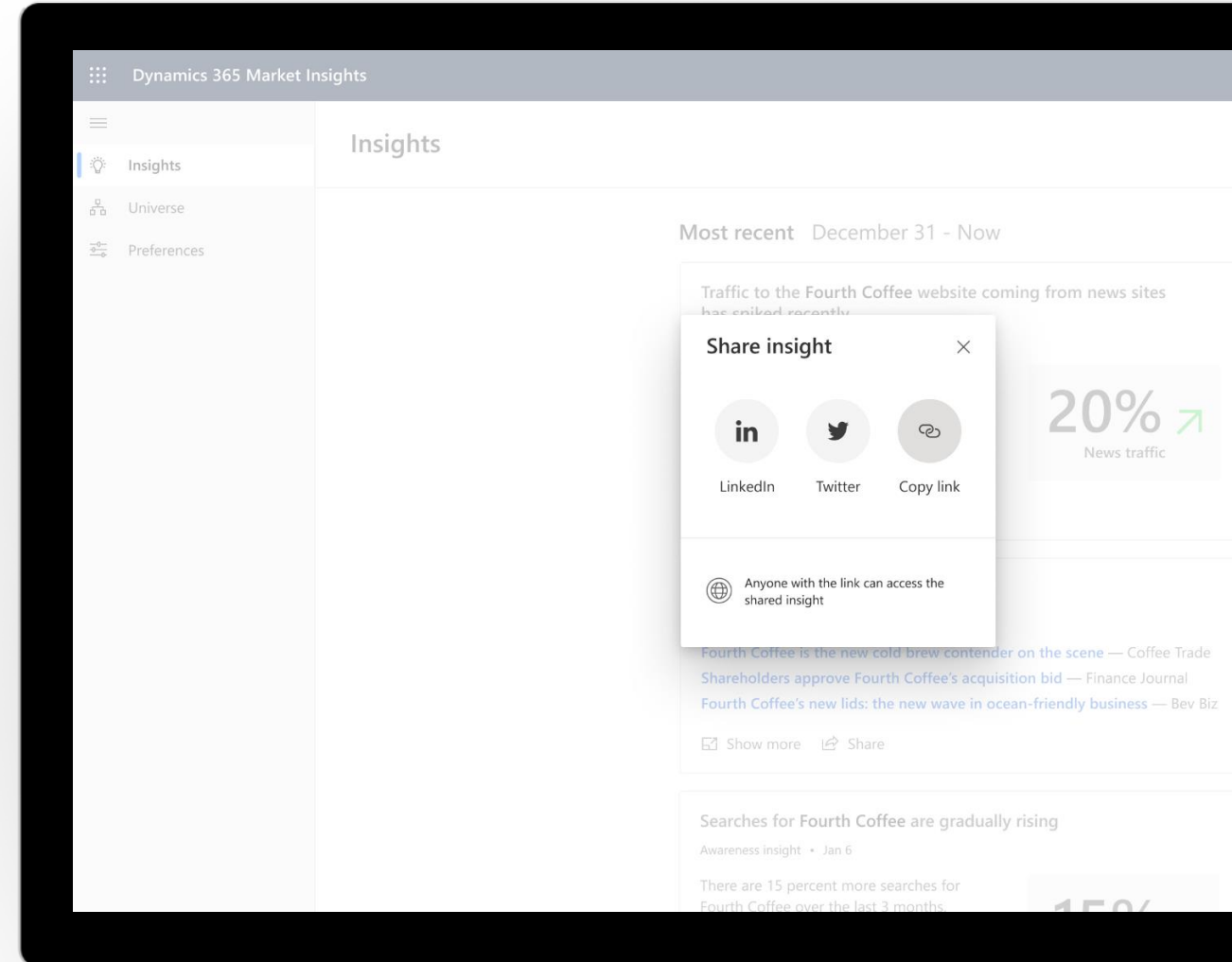
Easily integrate data

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
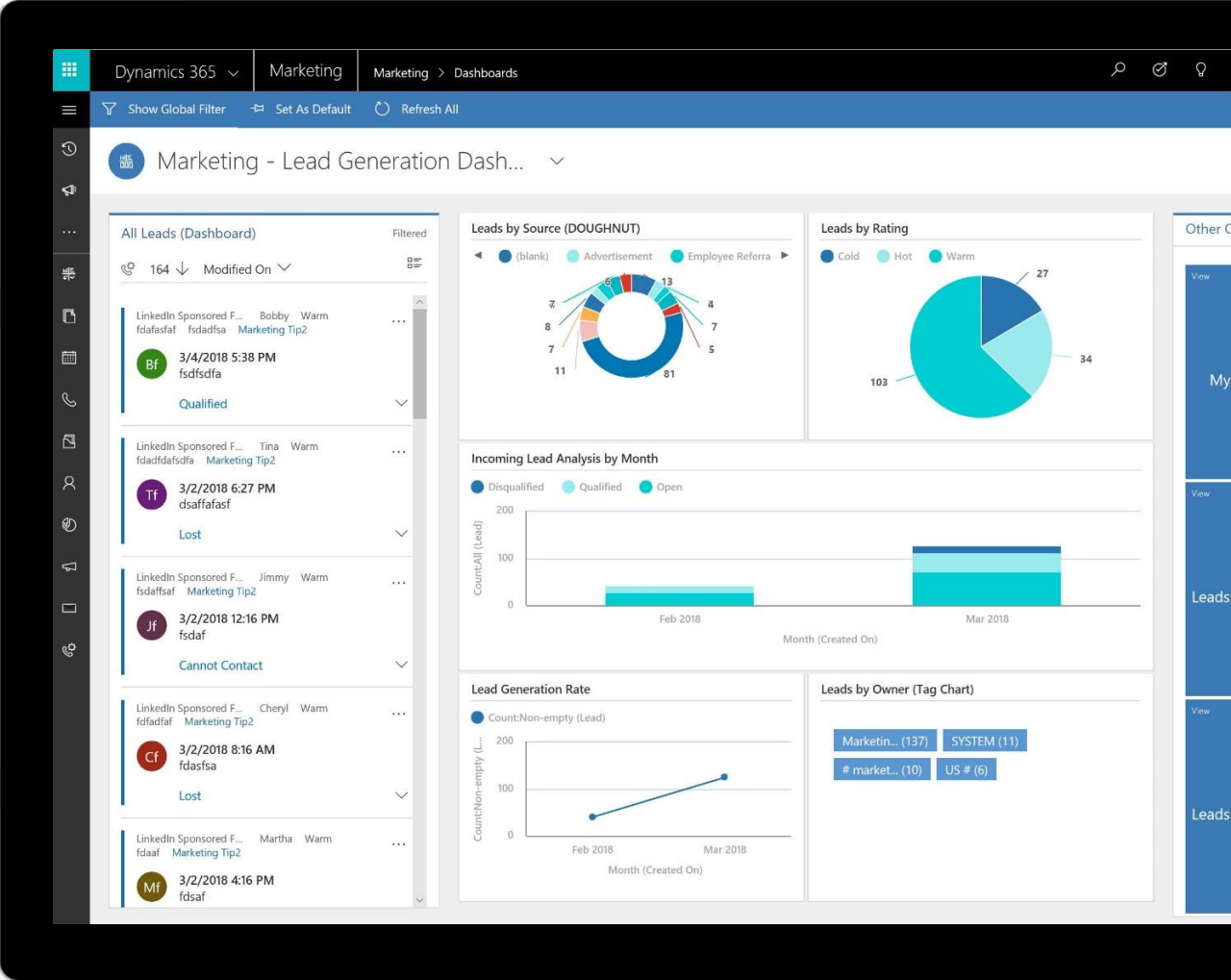
Enhance marketing campaigns

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
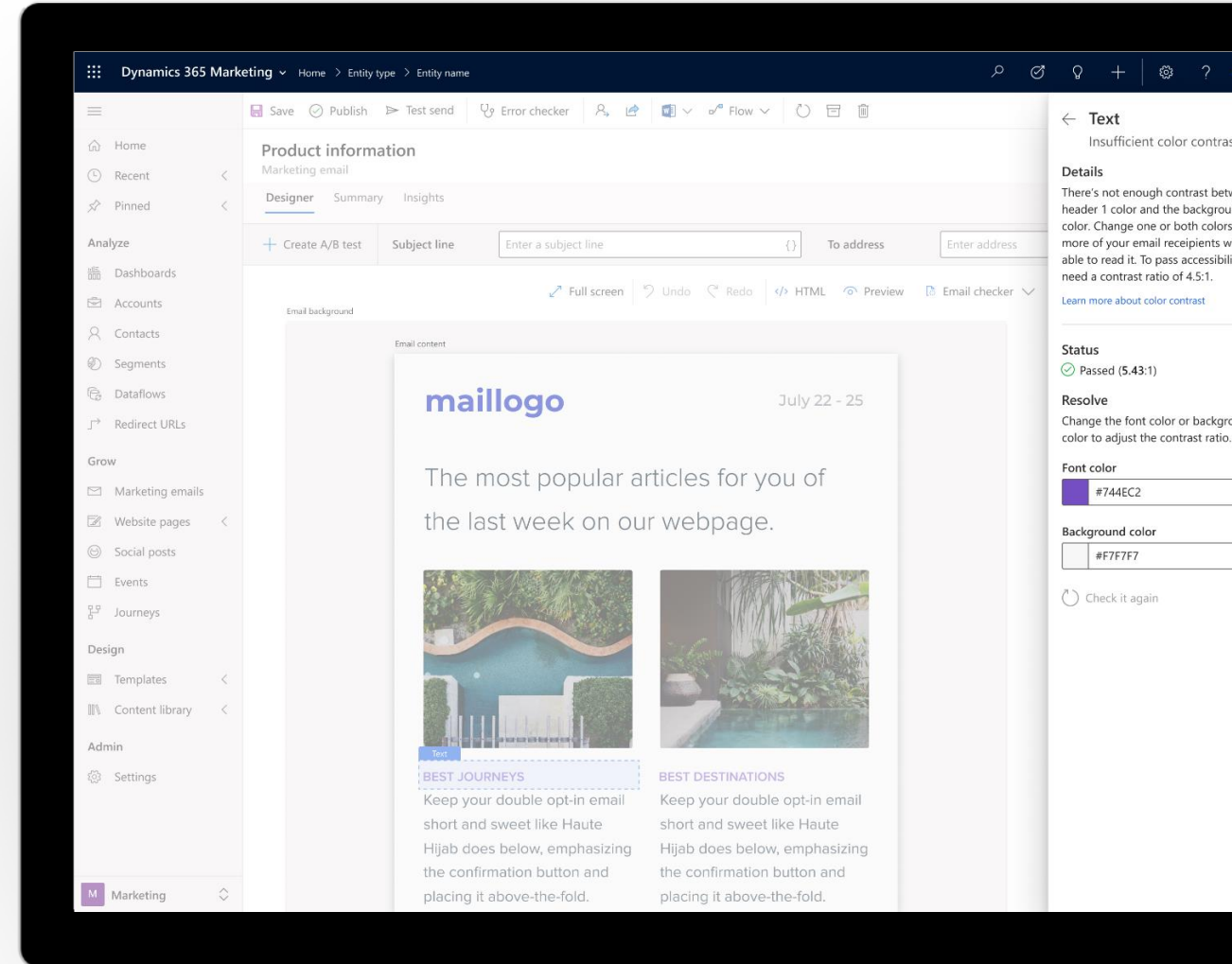
Market globally & maintain compliance

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

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