



COMMUNITY SUMMIT

CE/CRM

San Antonio, Texas
October 13-17, 2024



2024

**COMMUNITY
SUMMIT**

Microsoft Dynamics

CE/CRM

Education
Speaker

The largest independent innovation, education,
and training event for Microsoft Biz Apps



| Are you ready to use CRM and Marketing Automation Together?



A Dynamics–First,
'For User, By User'
Event.

“If you don’t have time to do it right, when will you have time to do it over?”

John Wooden

UCLA Men’s Basketball
10 championships in 12 years

What is your role?

| Agenda

- Marketing Automation vs. CRM
- Key Data Points
- Choosing a Marketing Tool
- Common Barriers to Success
- Q&A

Session Objectives

- Describe high level features of marketing automation and how they differ from core CRM features
- Define common data points used by automation tools and how to tune them for maximum impact
- Discuss how to evaluate marketing automation tools and find your best fit

Marketing Automation vs. CRM

Marketing Automation

- Mass Email Sending w/ Click-Tracking
- Email Authentication *
- Automated Email Sequences *
- Forms & Landing Pages *
- Automatic Lead Scoring *
- Activity Tracking / Engagement Timeline *
- Integrations with Webinar / Event Platforms

*Covered in future slides

@ 2024 Dynamic Communities

Marketing Automation

- Specialized Analytics / Reporting *
- A/B Testing *
- AI Content Generation (Microsoft Copilot) *
- Advanced List Building Tools
- Consent Management / GDPR Features
- Public File Hosting
- Custom Domains (www2.yourbrand.com)
- Social Media Connectors

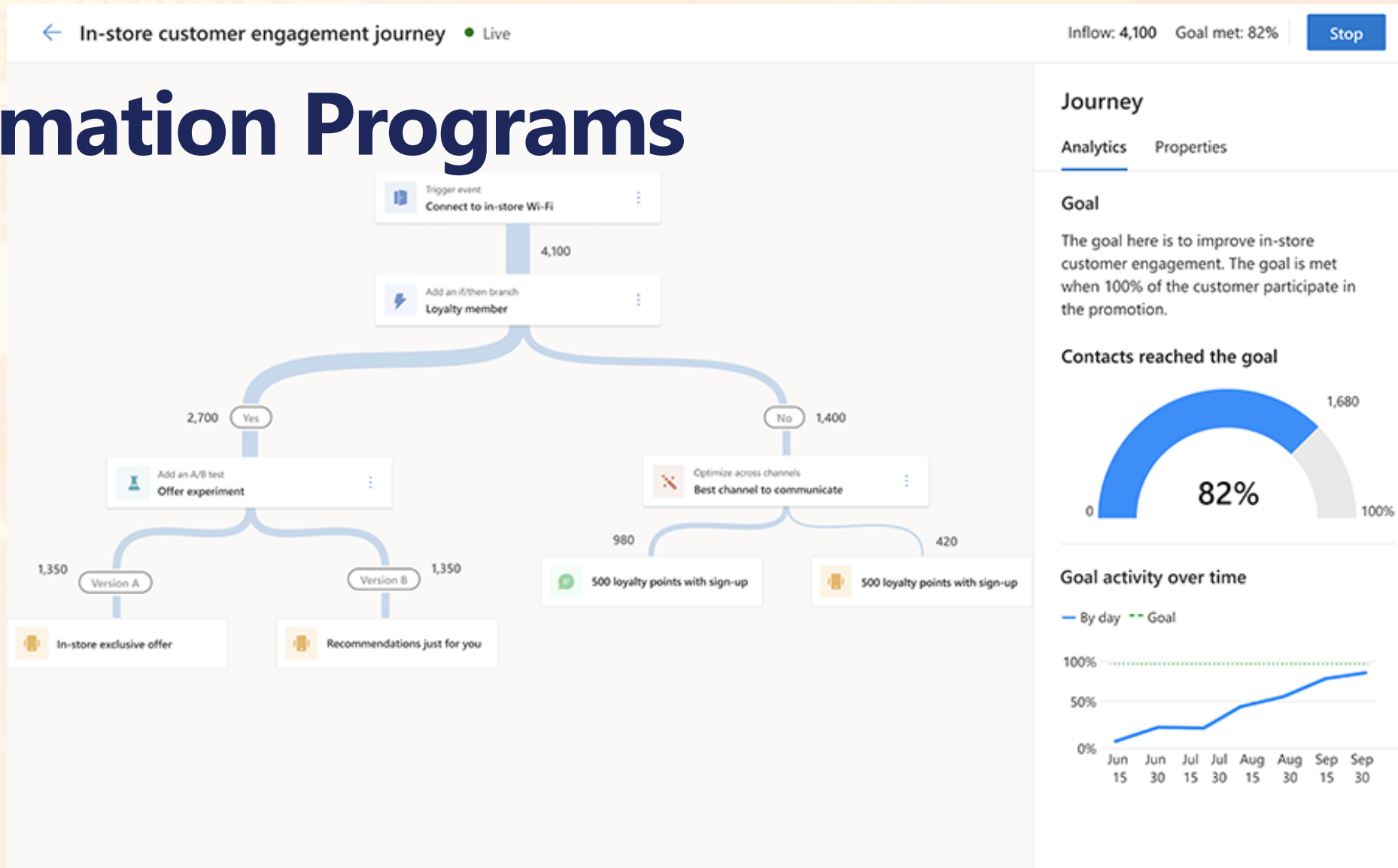
*Covered in future slides

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Email Authentication

- **SPF** (Sender Policy Framework)
- **DKIM** (DomainKeys Identified Mail)
- **Envelope-From / Return Path**
- **DMARC** (Domain-based Message Authentication Reporting and Conformance)
- **Dedicated IP**

Automation Programs



Source:
Microsoft
Learn

Landing Pages & Standalone Forms

The image displays a Microsoft Dynamics 365 form editor interface. The main canvas shows a landing page with the following elements:

- Form Fields:**
 - What is your first name? *
 - What is your last name? *
 - What is your email? *
 - What is your phone number?
 - What is your job title?
- Privacy Notice:**

We are committed to protecting and respecting your privacy. We will only use your personal information to administer your account and provide the services requested.

The right sidebar contains the following sections:

- Elements:**
 - Text (with 'Abc' icon)
 - Image (with image icon)
 - Captcha (with captcha icon)
 - Submit (with button icon)
 - Divider (with line icon)
- Consent:**
 - Purpose (with document icon)
 - Topic (with document icon)
- Layout section types:**
 - 1 column (single box)
 - 1:2 column (two boxes, one larger)
 - 2 column (two boxes side-by-side)
 - 2:1 column (two boxes, one larger)
 - 3 column (three boxes side-by-side)
 - Custom (three boxes with a pencil icon)

Lead Scoring & Grading

Lead Scoring

- How engaged are they?
- Based on activity

Event Participations	+75 Points
Form Submission	+50 Points
Email Clicks	+10 Points
Website Page Views	+3 Points

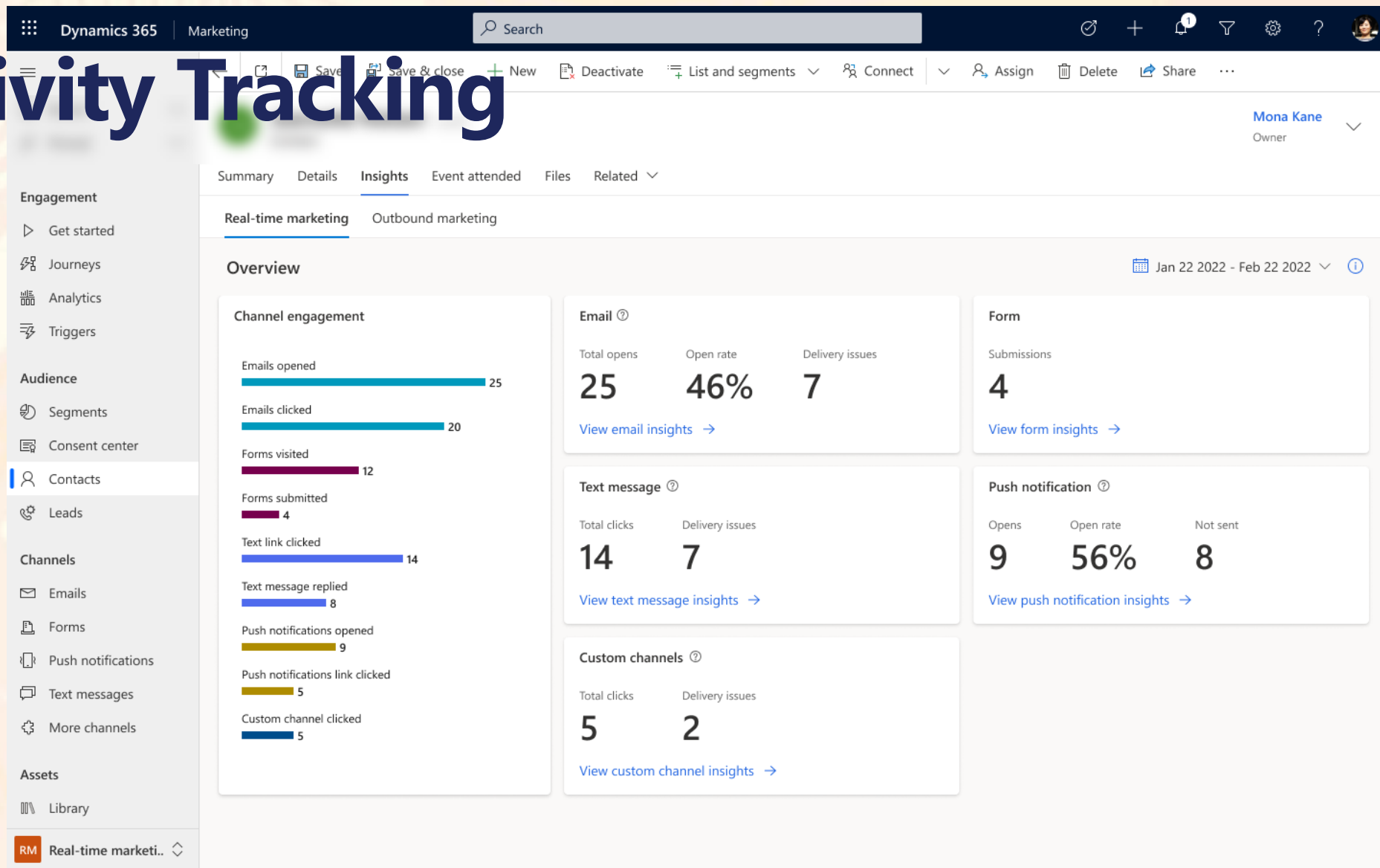
Lead Grading

- Are they a target customer?
- Based on ideal customer profile

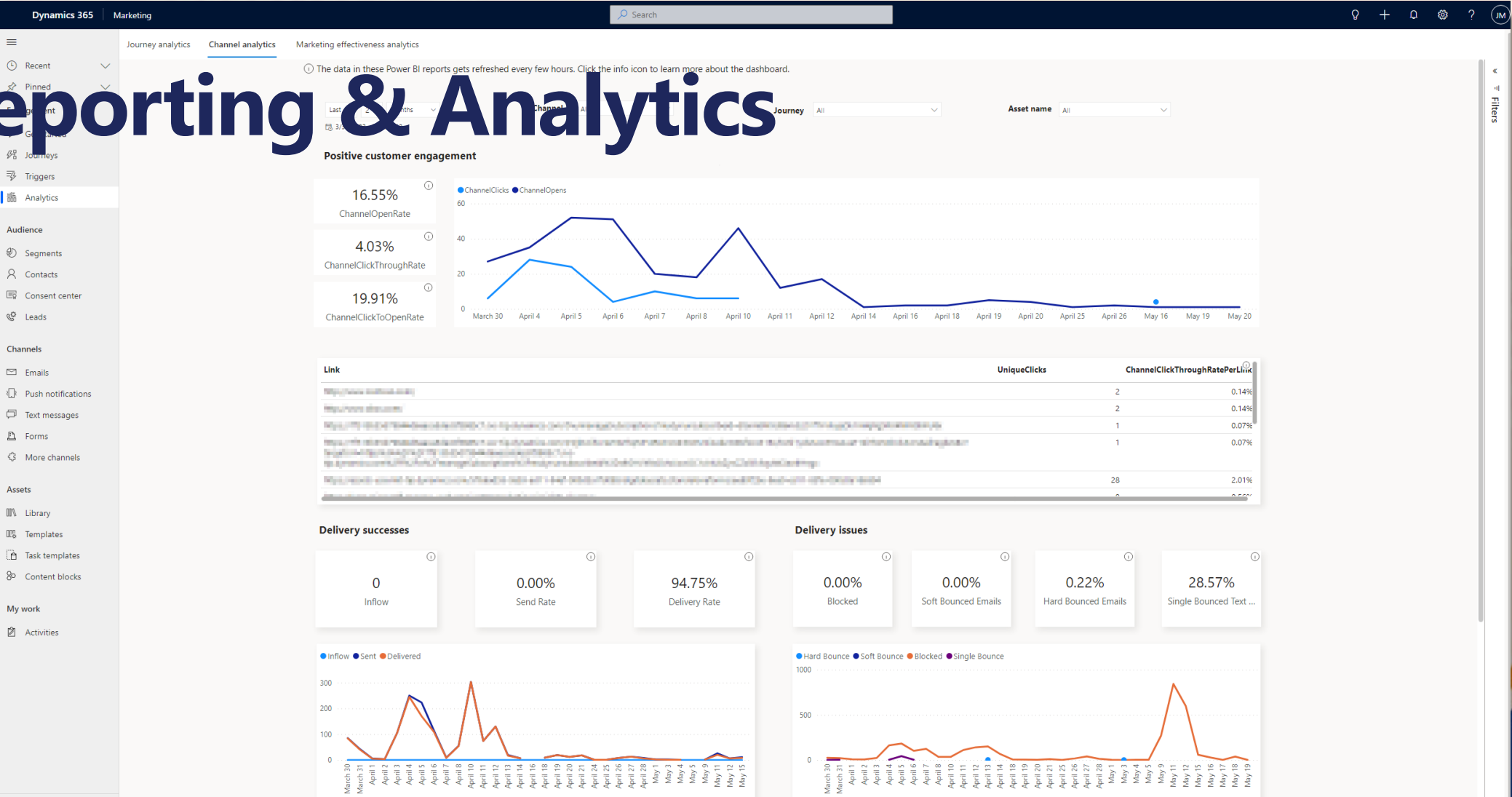
Company Size	+25 Points
Buying Influence	+25 Points
Job Level	+20 Points
Industry	+10 Points

Don't work in a vacuum.

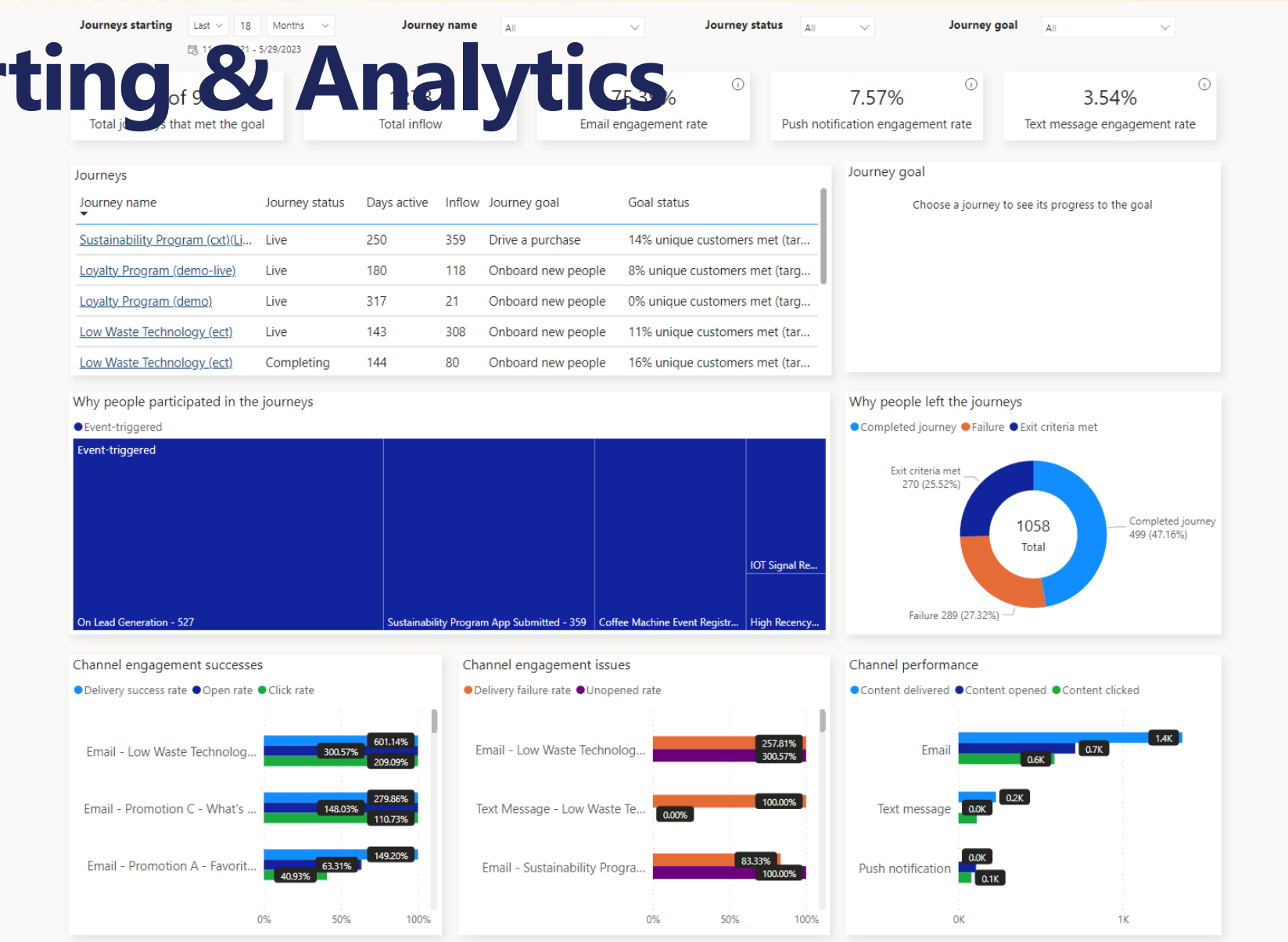
Activity Tracking



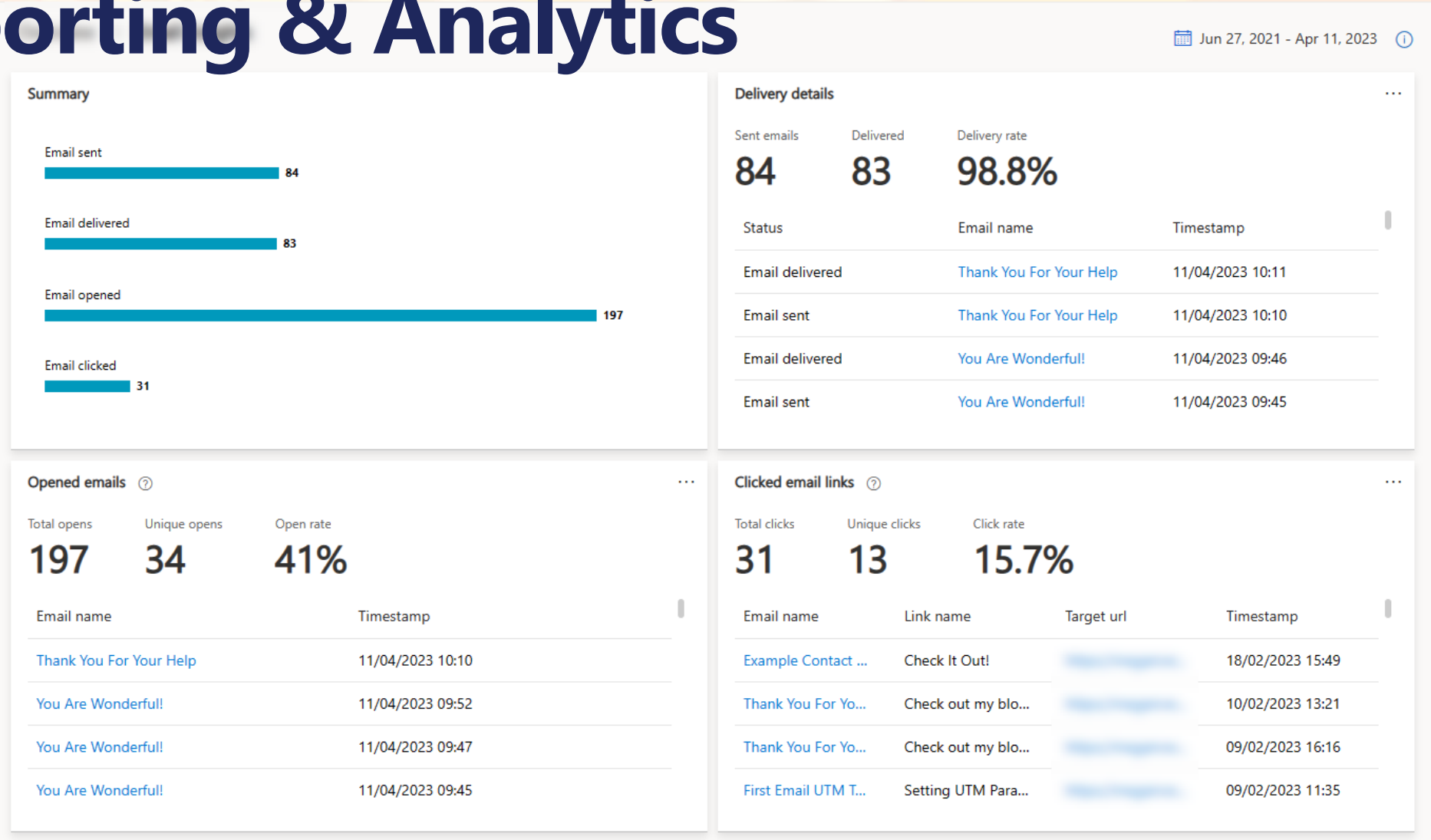
Reporting & Analytics

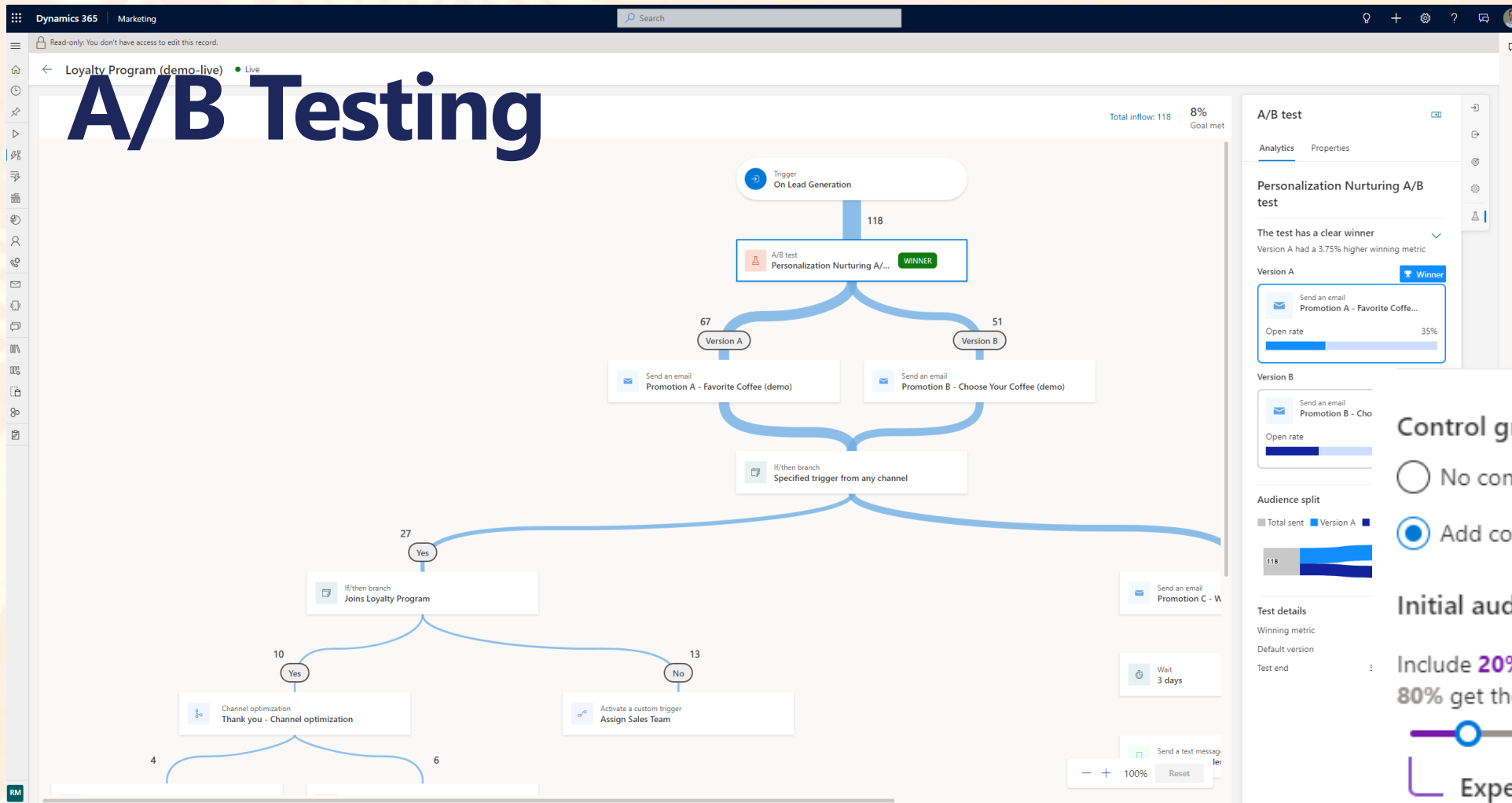


Reporting & Analytics



Reporting & Analytics





Control group

- ☐ No control group ⓘ
- ☒ Add control group ⓘ

Initial audience ⓘ

Include **20%** of audiences in the experiment, **80%** get the winner.

Experiment distribution ⓘ

10% A version, **10%** B version in experiment

AI Content Generation

The screenshot displays the 'Copilot Content Ideas' interface. At the top, there's a navigation bar with a back arrow, the title 'Copilot Content Ideas', a status indicator 'Draft - Unsaved', and action buttons: 'Save', 'Check content', 'Test send', and a prominent 'Ready to send' button. Below this is a sub-header with 'Design' and 'Preview and test' tabs, and a 'Brand profile' dropdown set to 'ASI'.

The main workspace is divided into two panels. The left panel, under the 'Design' tab, shows a preview of a Black Friday promotional email. The email has a dark background with white and gold text. The top section says '30% Off Everything*' followed by 'Black Friday Blowout Event', 'Nov 27, 5am', and 'Members-only early access starts NOW!'. Below this is a 'START SHOPPING' button. A context menu is open over the email preview, offering options like 'Text', 'Rewrite', 'Get ideas', 'Tone' (with a sub-menu showing 'Adventurous', 'Casual', 'Engaged', 'Formal', 'Luxury'), 'Shorten', and 'Lengthen'. The bottom of the preview shows '40% Off Essentials' and category links for 'MEN'S', 'WOMEN'S', and 'HOME'.

The right panel, titled 'Content Ideas', contains instructions: 'Describe what your content is about' and 'Add up to five key points that you want to get across in your email. Content Ideas will generate a set of text suggestions.' It includes a link to 'Use examples' and a warning box stating 'AI-generated content may be incorrect. Learn more'. Below this, there's a list of generated ideas: 'Early access Black Friday sale', 'Dynamics 365 Copilot user-friendly marketing', and 'Gift guide new arrivals'. Each idea has an edit icon. At the bottom of the list are buttons for '+ Add a keypoint', 'Refresh', and 'Clear all'. A progress bar shows the first three items are complete, with the text 'Well done!'. At the very bottom, there's a 'Tone of voice' dropdown menu currently set to 'Engaged'.

What NOT to expect

- “One platform that does it all”
- Direct management of digital advertising
- Line-by-line order confirmations *
- Segmenting by non-contact / account fields *
- Advanced social media posting features
- Social “listening” (aka. “sentiment analysis”)
- Event management *
- Built-in webinar hosting *
- Built-in video hosting

* Customer Insights - Journeys

@ 2024 Dynamic Communities

Key Data Points

Adopt the mindset, not the specifics.

The Architect Mindset

- What does my team need to know to serve our customers quickly and efficiently?
- How would we engage **differently** based on this information?
- How do I want to report on this in the future?

Leverage Points

- Better leverage points = better results
 - Smart option set values
 - Clearly understood values
 - Unique field usage – little overlap
 - Clear “ownership” of the data
 - Optimized data management

Leverage Points

- What's in it for us?
 - Smarter ad spending
 - Smarter content creation
 - Cleaner reporting
 - Automate assignments
 - Prioritize follow-up activities
 - Send targeted messaging
 - Send timely messaging
 - Populate scoring models

A Note About Field Types

- **Option Sets** are preferred
- **Multi-Selects and N:N** are hard to update in bulk or with form submissions
- **Text** fields are a last resort for most segmentation fields, but can be useful as “detail” fields

Key Standard Data Points

Entities

- Lead
- Contact
- Account
- Opportunity
- Marketing List / Segment
- Campaign
- Compliance Profiles *
- Purposes / Topics *

Fields

- Lead Source
- Source Campaign
- Do Not Allow Bulk Emails*
- Do Not Allow Emails*
- Email
- ParentContactID*
- ParentAccountID*

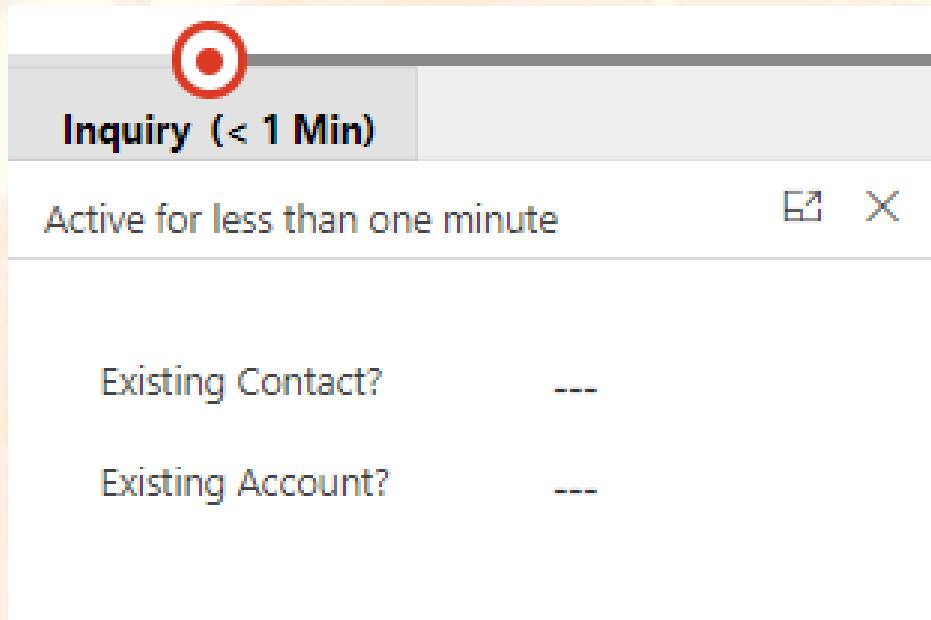
“Allow” vs. “Opt-In”

- “Allow” doesn’t necessarily mean “opt-in”
- Consider default values
- Capture clear consent for subscribers
- Legacy data from other platforms
- Consider dedicated “Opt-In” and/or “Opt-In Source” data capture

Note: the “Do Not Allow” fields can be *optionally* enforced in Customer Insights - Journeys, but don’t have to be.

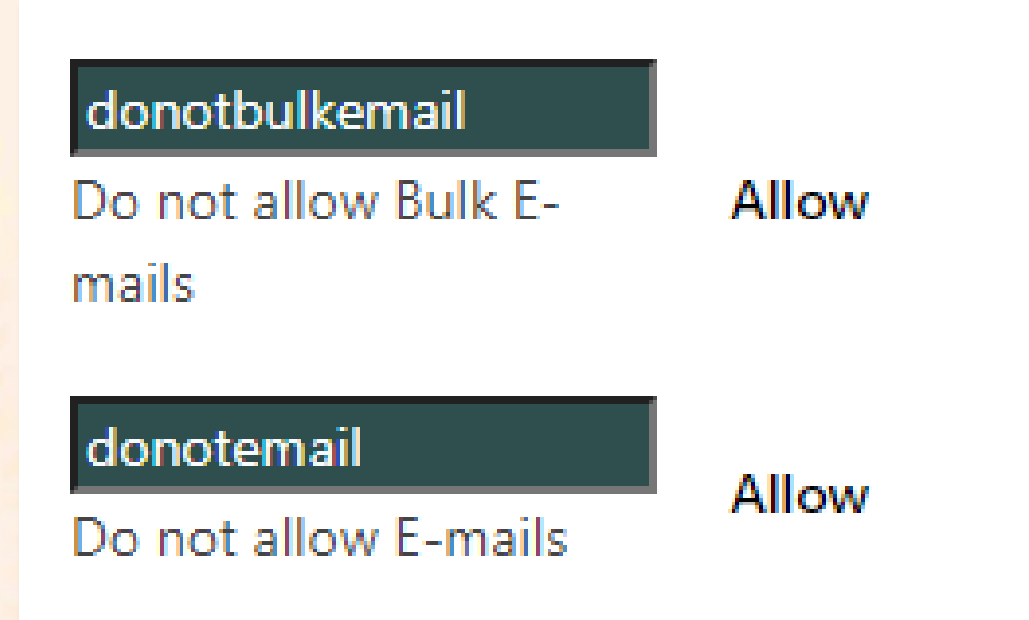
Key Standard Data Points

ParentContactID & ParentAccountID

A screenshot of a web form titled "Inquiry (< 1 Min)". The form has a header bar with the title and a red target icon. Below the header, there is a section titled "Active for less than one minute" with a close button (X) and a refresh button (circular arrow). The main body of the form contains two rows of input fields. The first row is labeled "Existing Contact?" and the second row is labeled "Existing Account?". Both rows have a dropdown menu with three options: "---", "---", and "---".

Inquiry (< 1 Min)	
Active for less than one minute	
Existing Contact?	---
Existing Account?	---

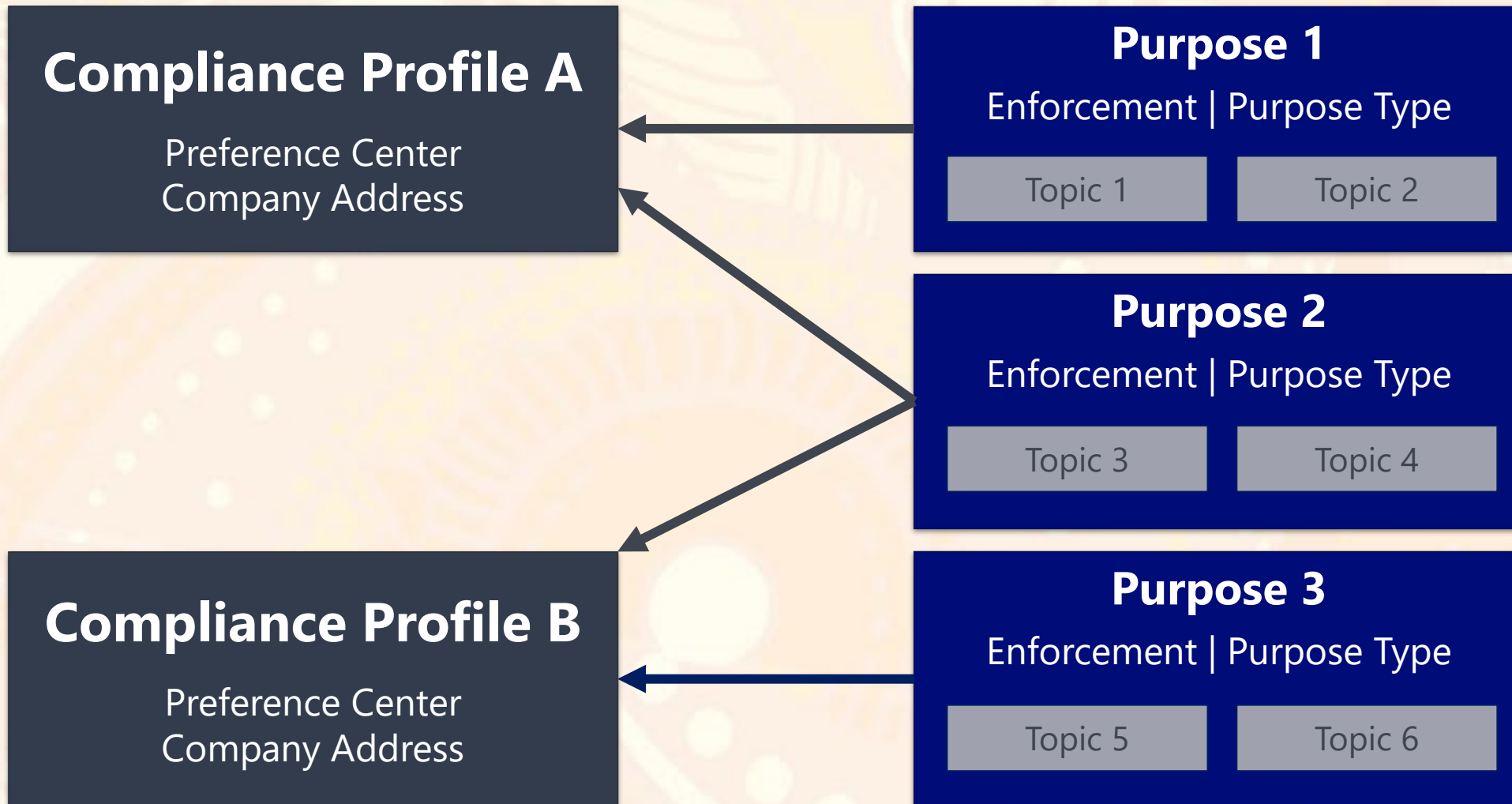
Do Not Allow Bulk Emails & Do Not Allow Emails

A screenshot of a web form with two sections. The first section is titled "donotbulkemail" and contains the text "Do not allow Bulk E-mails" followed by an "Allow" button. The second section is titled "donotemail" and contains the text "Do not allow E-mails" followed by an "Allow" button.

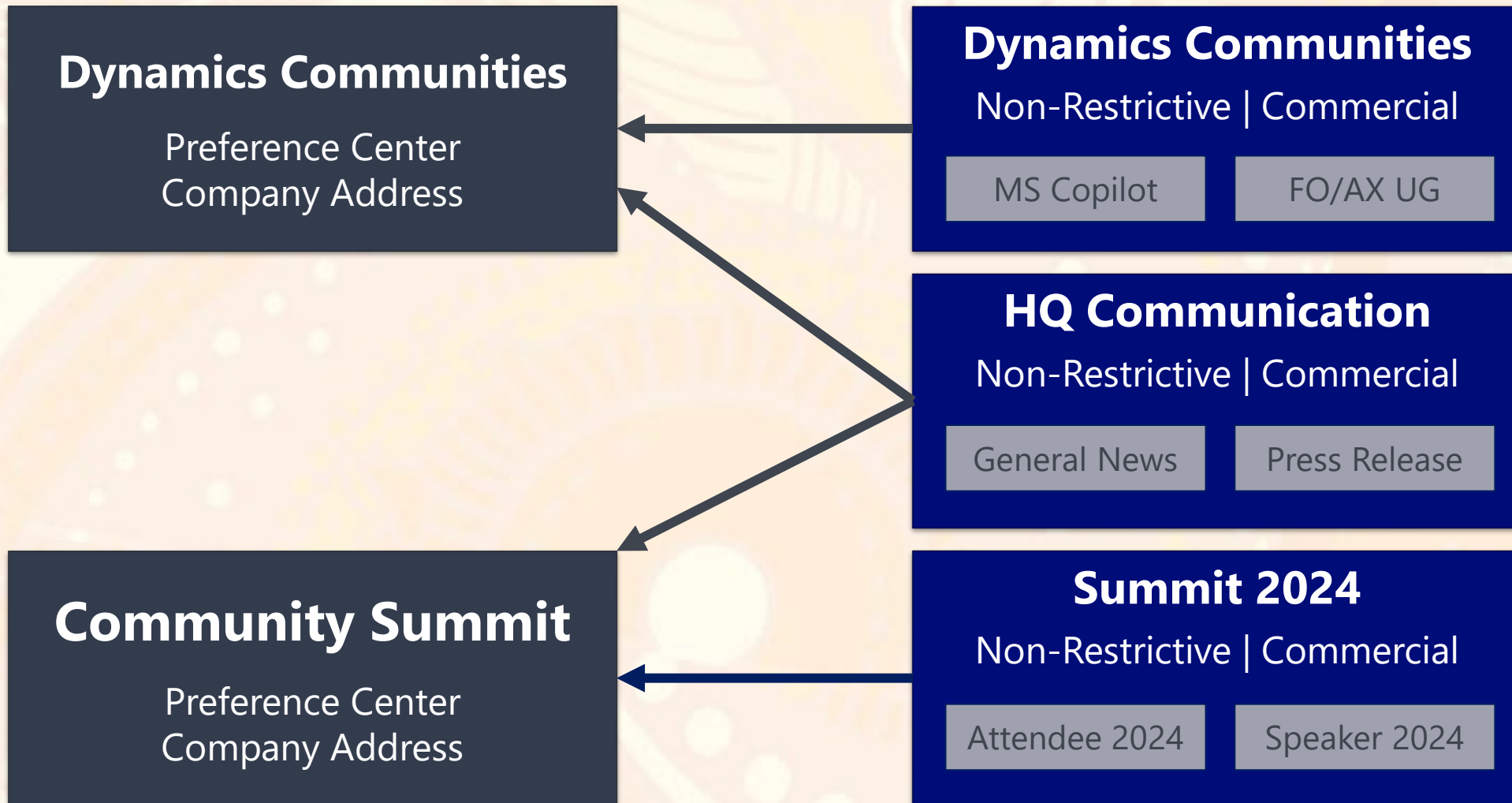
donotbulkemail	Do not allow Bulk E-mails	Allow
donotemail	Do not allow E-mails	Allow

Note: the "Do Not Allow" fields can be *optionally* enforced in Customer Insights - Journeys, but don't have to be.

Consent Management



Consent Management



Consent Management

Purpose Type

- **Commercial Communication:** Process consent
- **Transactional:** Do not process consent

Enforcement Models

- **Restrictive:** Only send if there's an opt-in
- **Non-Restrictive:** Send unless there's an opt-out
- **Disabled:** Don't process consent at all

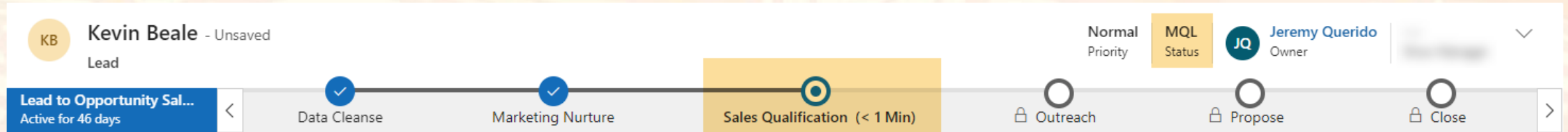
Note: The opt-in/out records (contact point consents) are processed at the email address level. They are not directly tied to a contact/lead as you'd expect.

Key Segmentation Data Points

Lead Source

- Event – Tradeshow
- Event – Public Workshop
- Event – VIP
- Event – Webinar
- Event – Webinar (On-Demand)
- Lead Form – Website
- Lead Form – Paid Social
- Lead Form – Paid Search
- Download – eBook

Qualification Status / Stage



- Open
 - Suspect / Unqualified
 - Prospect
 - MQL (Marketing Qualified Lead)
 - SQL (Sales Qualified Lead)
- Disqualified
 - Unresponsive
 - Bad Contact Info
 - Spam
 - Ineligible - Wrong Industry
 - Ineligible - Outside Region

Position or Role

Department

- Executive Team
- Information Technology
- Procurement
- Operations
- Engineering
- Quality
- Sales & Marketing
- Human Resources

Job Role/Function

- Branch Sales Manager
- Design Engineer
- Hygiene Specialist
- Procurement
- Consultant
- Board Member
- Student / Hobbyist

Job Level / Influence

Job Level

- C-Suite
- Senior VP/Director
- VP/Director
- Senior Manager
- Manager
- Team Member

Buyer Role

- Decision Maker
- End-User
- Champion
- Stakeholder
- Influencer
- Economic / Technical Buyer

Size

Employee Range

- Less than 50
- 50–99
- 100–249
- 250–999
- 1,000–2,500
- 2500+

Company Size / Revenue

- Number of Locations
- Number of Branches
- Number of Technicians
- Number of Members
- Annual Revenue

Interest / Customer Goal

Product Interest

- Auto Loan – New Car
- Auto Loan – Used Car
- Home Mortgage
- Small Business Loan
- Small Business Credit Card
- ...

Inquiry Type

- Quote Request
- New Project Request
- Technical Support
- Career/HR
- Sponsorship
- ...

Tuning Your Option Sets

- **Too specific** can be dangerous
- **Too broad** can be dangerous
- **Ambiguous** can be dangerous
- **Time-based** values lead to runaway options
- **Acronyms** might not be understood – especially in the long run

How many is too many?

Cultivate confidence for your users.

Questions?

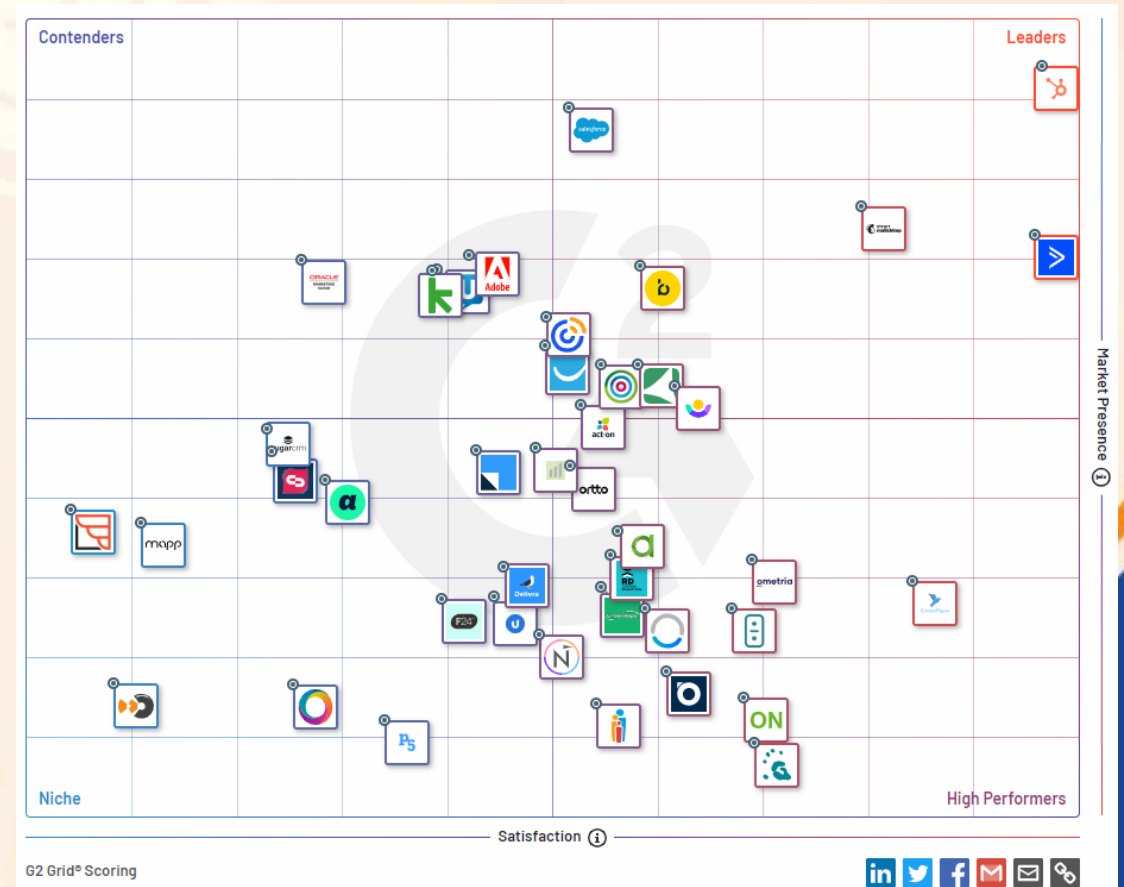
Choosing a Marketing Tool

No platform is perfect.

So many options...

- Customer Insights – Journeys
- ClickDimensions
- HubSpot
- Act-On
- Klaviyo
- Marketo
- ActiveCampaign
- Eloqua
- ...

Source: g2.com



Key Technical Differentiators

- Create a lead for each form submission
- Keep prospects in a separate database
- GDPR and consent management features
- Segmentation options
- Automation program flow control
- Analytics
- Third-party integrations
- Landing page / form editors
- Ability to use “form-only” fields

Low

SMS & Mobile

Social Media

Surveys

Content Hosting

Admin & Security

Account-Based Marketing

Offline Marketing

Medium

Website Tracking

Campaign Management

Events & Webinars

Audience Building

High

Email Marketing

Lead Scoring

3rd Party Integrations

Critical

Landing Pages / Forms

Automation Programs

CRM Integration

Segmentation

GDPR

Reporting

Start with “simple and reliable.”

Learn More

- G2.com is the best place for doing your own research
- Talk to an expert with experience in multiple platforms
- Talk to your professional network
- Review company's help forums to see how active their community is
- Set up a trial account for Customer Insights – Journeys

Common Barriers to Success

Common Barriers to Success

- Alignment of Definitions
- Alignment of Processes
- Alignment of Systems

Align before you launch.

Alignment of Definitions

- What is a lead?
 - Existing customer visits your booth to discuss a new project
 - New prospect attends one of your webinars
 - Existing customer sends in a quote request
 - Existing customer adds a product to their cart

Alignment of Definitions

- What is a **qualified** lead?
 - Lead Score > x
 - Meets 2+ BANT (**B**udget, **A**uthority, **N**eed, **T**imeline)
 - “Requested Sales Follow-Up”
 - Submitted Quote Request or Lead Form
 - Job Level > x
 - Company Size > x

Alignment of Definitions

- What is a **duplicate** lead?
 - Same person / email?
 - Same inquiry type / interest type?
 - Same timeframe?
 - Same status?

Alignment of Processes

- Who is responsible for qualifying leads?
- Who is responsible for assigning leads to sales?
- Should marketing be talking when sales is engaged in 1:1?
- What communication should never be sent to customers?
- How should we communicate to customers vs. prospects?

Alignment of Systems

- General Data Management
 - Ex. Lead Source – first time update only!
 - Ex. Contact point consents / Do Not Allow fields– educate users or prevent access
 - What is the “source of truth” for subscriptions and consent to email?
 - What are the definitions for your lead sources?
- Lead to Opportunity Qualification
- Non-Standard Entities (lead, contact, account, opportunity)
- Non-Standard Fields (donotbulkemail)
- Subscription Management / Topics

Key Takeaways

Key Takeaways

- Don't work in a vacuum.
- Cultivate confidence for your users.
- Adopt the mindset, not the specifics.
- No platform is perfect.
- Start with "simple and reliable."
- Align before you launch.

Q&A

Thank you for attending

Kevin Beale

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My Contact Info



Please fill out your survey!



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