Week -> 4 & 5

## Marketing Module Life Cycle in Dynamics 365 Customer Engagement

Every organization spends a lot of money in the marketing of their business products and services. So streamlining of the Marketing department and process is must.

Dynamics 365 CE or CRM provides a very flexible way of handling all Marketing issues of all types of Businesses by providing built-in entities to store marketing data and robust insight for sales persons to make decisions in the lead capture process.

Dynamics 365 Marketing App provides below entities to hold marketing related data for the life cycle.

1. Marketing List
2. Campaign
3. Campaign Activities
4. Targeted Products
5. Sales Literature

6. Campaign Response
7. Lead Capture / opportunity Creation
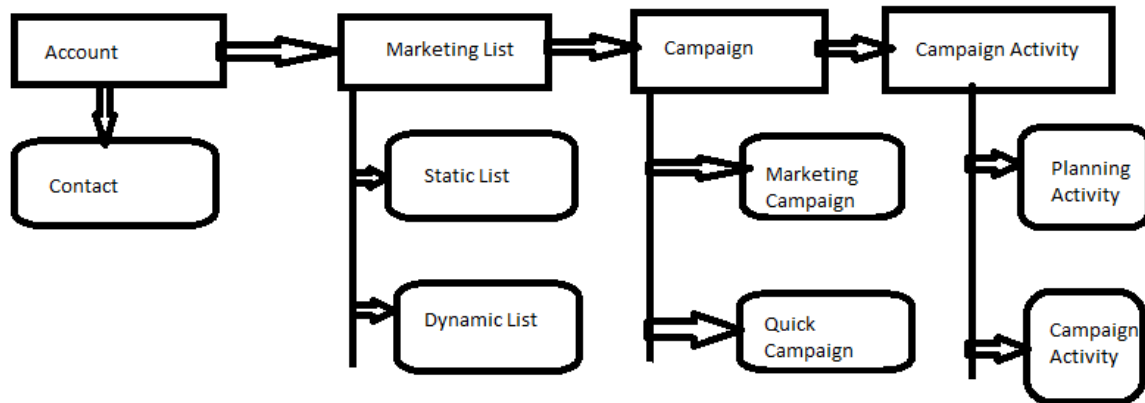
This is the most important module of all business. The sales depends on the marketing department in most of the cases.

The Life Cycle of a Marketing module explained below.

1. Marketing List

The first and important decision taken by all businesses is creating Marketing Segments to organize contacts/accounts from the database into logical groups that match the marketing strategies.

In Dynamics 365 we can create a collection of segments to target the right audience those we already know in some scenarios. For example We can create a segment named as "Customers who are frequently calling overseas calls" or "customers visited to our boot camp". Segments like these, which you define by using a set of rules and conditions, are called *dynamic segments* (**Dynamic marketing List**) because membership in these segments changes constantly and automatically based on information in your database. (Static segments (**Static marketing List**) are populated by adding contacts explicitly, one at a time.)

In the marketing List as per the selection of List type (Dynamic/Static) the Member Tab will be displayed and here we can click on **Manage Member** button from

command bar. by Selecting look for option we can select Accounts or Contacts and then we can add query Rows as per below screen.

Now Click on Find to see the results and click on use Query to add the Members in the Marketing list.

NOTE: Please keep in mind that as this is a dynamic type list so in the course of time any contacts satisfying the criteria will be also automatically added to that list.

2. Campaign

After creation of a Marketing list organization creates a campaign. **Campaign** is a process of promoting products or services by setting up some events such as Trade Show, BootCamps, Flyers etc.


A Predefined Marketing list(s) gets associated with the campaign to target the list of customers for the campaign. For example: A company may create a Marketing list with the customers whose age is greater than 40. Then create a campaign for a special discount on the new products/services and send campaign mailers to get the customers and in turn making new sales.

We can create a **Quick Campaign** also in Dynamics 365 CE which is the same as Marketing Campaign with some limited functionality as given below.

- Quick Campaign only supports a single activity type.
- Quick Campaign only targets one list of customer

3. Campaign Activities

During a campaign event sales users or marketing department users create many activities regarding the campaign like, Phone Call, Email, Task etc to let the customers know about the campaign. These are called **Campaign Activities.**
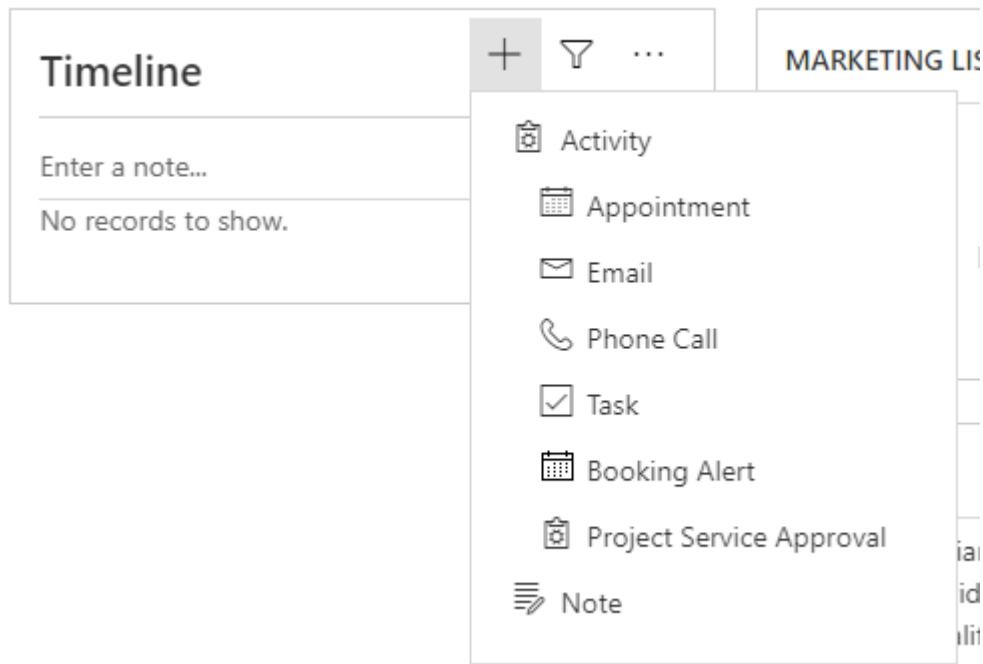
We can create different types of Campaign activities as per above screenshot. Such as , Appointment, Email, Phone Call, Task, Bokking Alert, project Service Approval etc.

4. Targeted Products

In the process of Campaign we can associate existing products to the campaign which are required for the discount and promotional offers.
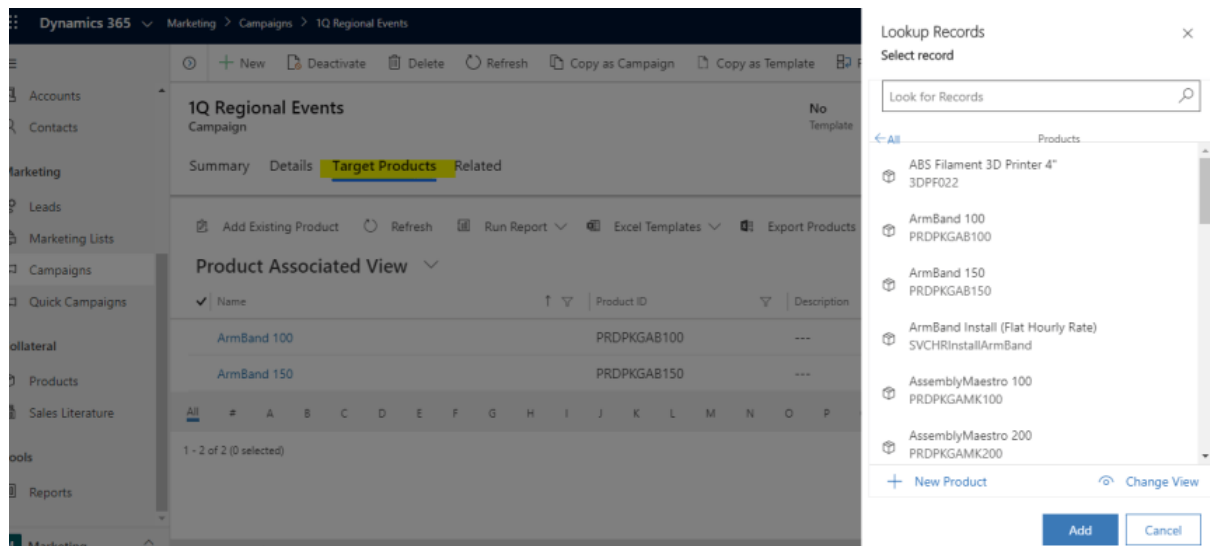
Add product to Campaign

5. Sales Literature

Sales Literature is the repository information about the products and services that are targeted for a campaign. sales users can refer to the sales documents while dealing with customers for winning a potential sale.
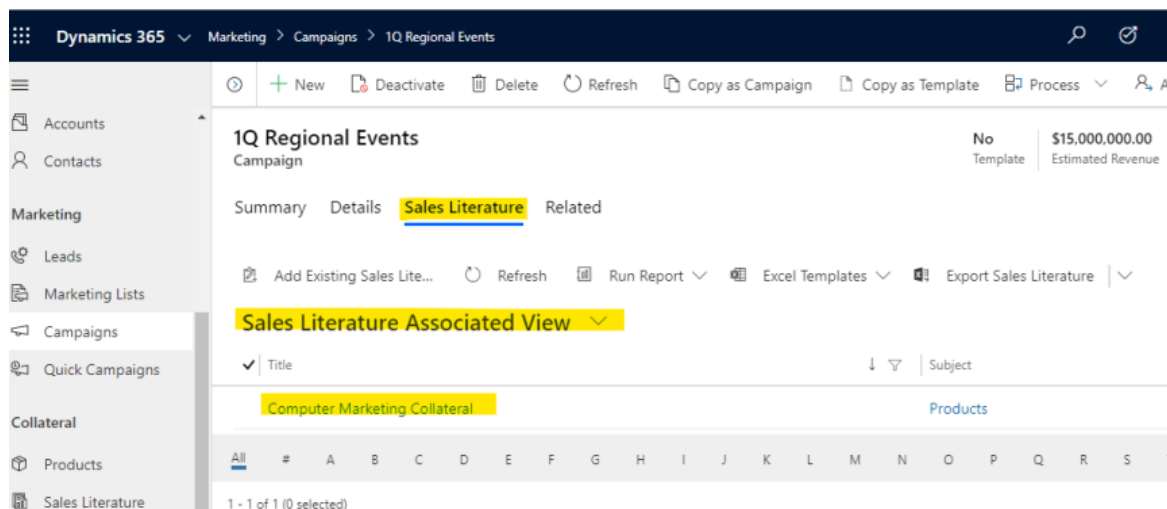
6. Campaign Response

Campaign Response is the information or response captured from customers as a result of Campaign. Organizations capture the customer response and convert it to a potential sale.

Campaign Response

7. Lead Capture/Opportunity Creation

After the response is captured Customer Representative decides whether the response will be converted to a Lead or not.

The response can be converted to a New Lead, To an Existing Lead, To a new Opportunity, account, contact, quote or simply close the repsponse. if a new Lead generated then the Sales Life Cycle Starts.

Customer entities (account, contact)

The *account* and *contact* entities in Dynamics 365 for Customer Engagement are essential for identifying and managing customers, selling products and services, and providing superior service to the customers.

The account entity is one of the entities in Dynamics 365 for Customer Engagement to which most other entities are attached or parented. In Dynamics 365 for Customer Engagement, an account represents a company with which the business unit has a relationship.

Information that is included in an account is all relevant contact information, company information, category, relationship type, and address information. Other information that applies includes the following items:

- An account can be a parent to almost any other entity. This includes another account.
- An account can be a standalone entity.
- An account can have only one account as its parent.
- Accounts can have multiple child accounts and child contacts.

Contact entity

In Dynamics 365 for Customer Engagement, a contact represents a person, usually an individual, with whom a business unit has a relationship, such as a customer, a supplier, or a colleague. The contact entity is one of the entities that most other entities are linked to. A contact can be a stand-alone entity. Included in this entity are professional, personal, and family information, and multiple addresses.

Both accounts and contacts are part of managing customers and are related to one another in the following ways:

- A contact can be a parent to every other entity except accounts and contacts.
- A contact can have only one account as its parent.
- A contact can be marked as the primary contact person for an account by using the Update method.

Marketing Segments vs. Marketing Lists in Dynamics 365 Marketing

Microsoft Dynamics 365 Marketing is a robust digital marketing application that provides multiple ways for marketers to engage with individual leads and contacts. D365 Marketing used different marketing list types to target specific groups of contacts through email marketing campaigns called customer journeys. These list types allow the marketer to target contacts based on demographic information, list subscription, or even behavior with content delivered through Dynamics 365 Marketing.

The variety of list types can be confusing, so it's important to understand the difference. There are two main list types: the marketing segment and the marketing list. Marketing segments are designed to be paired with customer journeys so a marketer can guide members of a selected subset of contacts through a journey of content that can include marketing emails, marketing forms & pages, events, and more. There are five types of marketing segments: dynamic, static, compound, profile, and behavioral. This chart from Microsoft documentation shows each list type and it's uses in Dynamics 365 Marketing.

Supported Operation	Static segment	Dynamic segment	Static marketing list	Dynamic marketing list
Use in customer journey	Yes	Yes	Subscription list only	No
Use in campaign / quick campaign	No	No	Yes	Yes
Include in a segment	Yes (compound segment)	Yes (compound segment)	Yes	No
Show on subscription center	No	No	Subscription list only	No
Query interaction records from the marketing-insights service	No	Yes	No	No
Go live to activate	Yes	Yes	No	No
Runs on the marketing-insights services	Yes	Yes	No	No
Add/remove a contact while viewing the contact record	Yes	No	Yes	No
Resulting entities	Contacts only	Contacts only	Contacts, leads, or accounts	Contacts, leads, or accounts

Used with courtesy from Microsoft

If a marketer targets all contacts from New York, or all contacts who are interested in a specific line of business, they can use a marketing segment to help separate these two groups of contacts and target them with a different marketing strategy depending on their traits. This kind of diversity allows for quick and effective marketing strategies. Finally, marketing segments can crunch very large volumes of data without affecting performance.

Segments can further be divided into dynamic or static types. A dynamic segment is setup using logical expressions where D365 Marketing automatically groups contacts into the segment. In the above example, if the logical expression was all contacts from New York and someone were to create

a contact later who was from New York, the system would automatically recognize their location and add them to the New York segment and associated, active customer journeys.

A static marketing segment, on the other hand, requires manual association. If there is a specific subgroup of people that couldn't be reached through a dynamic segment, or if a marketer wanted to group these contacts together by specific knowledge they have about the contact which wouldn't be covered in a normal query, a static segment makes this possible. It's important to note that a dynamic segment does not allow for manually modifying which contacts are associated with it. If manual changes to the list are necessary, a static segment must be used instead. There are also compound segments which combine multiple segments to create a single segment to be used in customer journeys.

Segments can also be based on profiles or interactions that the contact has had with the contact. Profile segments search through the profile records that are stored in marketing-insights. These profiles sync across any Dynamics 365 accounts and include many different entities in Dynamics 365. Entities like contacts, accounts, leads, and any other custom or system entities can be synced with these segments across the Dynamics 365 ecosystem.

Finally, behavioral segments sort through interaction records that have been stored in marketing-insights. Any interaction that a contact has had with marketing efforts in Dynamics 365 Marketing tracked and related to a contact record. This allows a marketer to see if a contact has opened an email, for example, or submitted a form to the website which helps gauge involvement and interest level that the customer may be at. These different types of segments are useful in their own way and provide a very flexible solution to create contact lists to be used in marketing campaigns.

Th**e other type of list in Dynamics 365 Marketing is a marketing list. T**here are three types of marketing lists: dynamic, static, and subscription. Just like marketing segments there are both static and dynamic marketing lists. Unlike marketing segments, a dynamic marketing list is significantly more limited in function. The primary marketing list type that is most likely to be used is a special type of static list called a subscription list. A subscription list enables a contact to sign up to join a mailing list in a customer journey created in

Dynamics 365 Marketing. This is the primary way in which email marketing contacts are organized. Unlike traditional static and dynamic marketing lists, a subscription list is able to be used on it's own within customer journeys.

Dynamics 365 Marketing users evaluate what belongs in a marketing list by using logical expressions, but they can only focus on campaigns. In comparison, dynamic segments support querying from marketing-insights to check interactions. Just like dynamic segments, dynamic marketing lists cannot be manually modified. To manually modify a marketing list, a static list must be used. These tend to have more uses than dynamic lists because a static list can be included into a segment used in a customer journey. A dynamic segment can also query into static marketing lists which allows for a segment to work in conjunction with a list.

While marketing segments operate using marketing-insights, marketing lists operate entirely within Dynamics 365 Marketing. Rather than targeting contacts with specific demographics or behaviors, marketing lists are designed to work with campaigns and quick campaigns in much the same way. Marketing lists can work with more than just contacts - if a marketer wants to focus on leads or accounts, they need to use a marketing list. Marketing lists do not need to sync with marketing-insights to run. This can be a disadvantage since marketing-insights provides helpful tracking and performance improvements. Usually, marketing lists are used for the process after a customer journey and should be used sparingly considering the many strengths of segments.

Segments

Segments are target groups you want to include in your marketing activities.

In Dynamics 365 Marketing we work with segments. You can easily compare segments with marketing lists as segments also work with dynamic or static segments. But segments are much more than marketing lists you traditionally know from Dynamics 365 *.
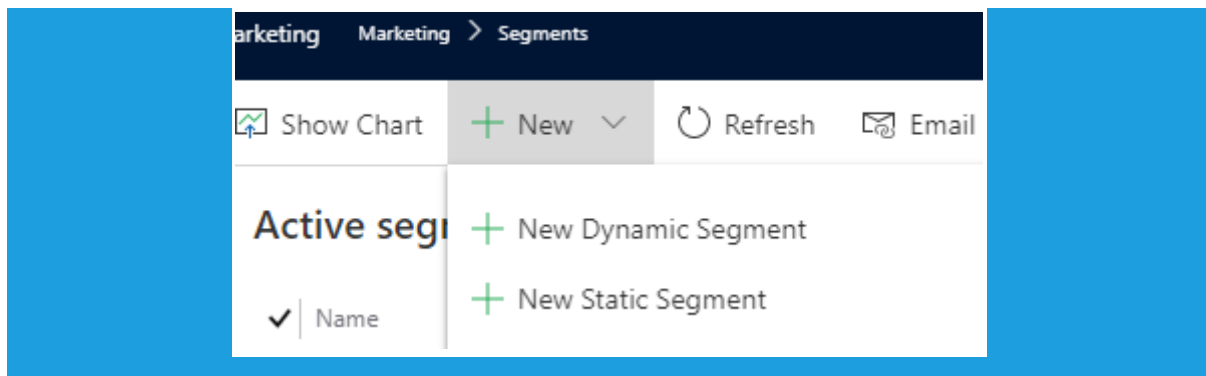
Note: There are both segments and marketing lists in Dynamics 365 Marketing.

Segment = A group you have put together so you can do targeted marketing activities for them.

Marketing lists = If you have a marketing form and I fill it out, then I can be added to a marketing list that collects everyone who fills out the form. (You can then build a segment based on that marketing list)

Marketing lists are also used for your subscription lists – for example those who have signed up for your newsletter.

WEEK ->6

Event planning

Business Process Flow Of Event

1) Preliminaries– Event Type,When where and waitlist-50
2) Agenda – Sessions, speakers,Sponsors
3) Organise– venue session,catering,guest logistic
4) Promote- setup,Registration ,event invitation ,collateral
5) Launch– Pre Event reminders, notify Authority.
6) Post Event-Send ThankYou,Email,Survey,follow ups,leads.

Marketing Emails

In Dynamics 365 Marketing, you'll target a **single marketing email message design** to an entire marketing segment, but each individual message is personalized for each recipient and delivered, one at a time, from your organization to the recipient.

The process for creating marketing emails in Dynamics 365 Marketing begins with understanding what makes them such a powerful tool for your marketing campaigns. After you create a good design aimed at a specific segment of your audience, you preview it and check for errors before going live. You can fine-tune the reach and effectiveness of your message through advanced operations like merging database values, adding dynamic content, and introduce programming logic.

# Customer Journeys in Dynamics 365 Marketing

In Dynamics 365 Marketing, a Customer Journey is an automated marketing campaign intended for a specific target audience. With a drag-and-drop journey designer, marketers create a customised pipeline or path consisting of steps to send personalised email messages, schedule follow up activities for sales team members, trigger workflows, and execute campaign-related activities. As each member of the target segment progresses down the path, their reactions and interactions are tracked in the system, providing insight into the true reach and effectiveness of the marketing initiative.

As you engage potential customers, they start by discovering your product, evaluate whether it meets their needs, look for a good offer, and finally make a purchase. We call this process the *customer journey*. Use customer journeys to create a model that helps you guide the members of a selected marketing segment through this process by using automated messaging, activity generation, interactive decision points, and more.

A simple customer journey can include just two steps: identifying the target segment and creating an activity that addresses the members of that segment. In the following procedure, you'll set up a simple customer journey that sends an email message to all the members of a target segment.

Focused Canvas Experience

Dynamics 365 Marketing users can now build out their entire journey and all related elements without leaving the journey Designer canvas.
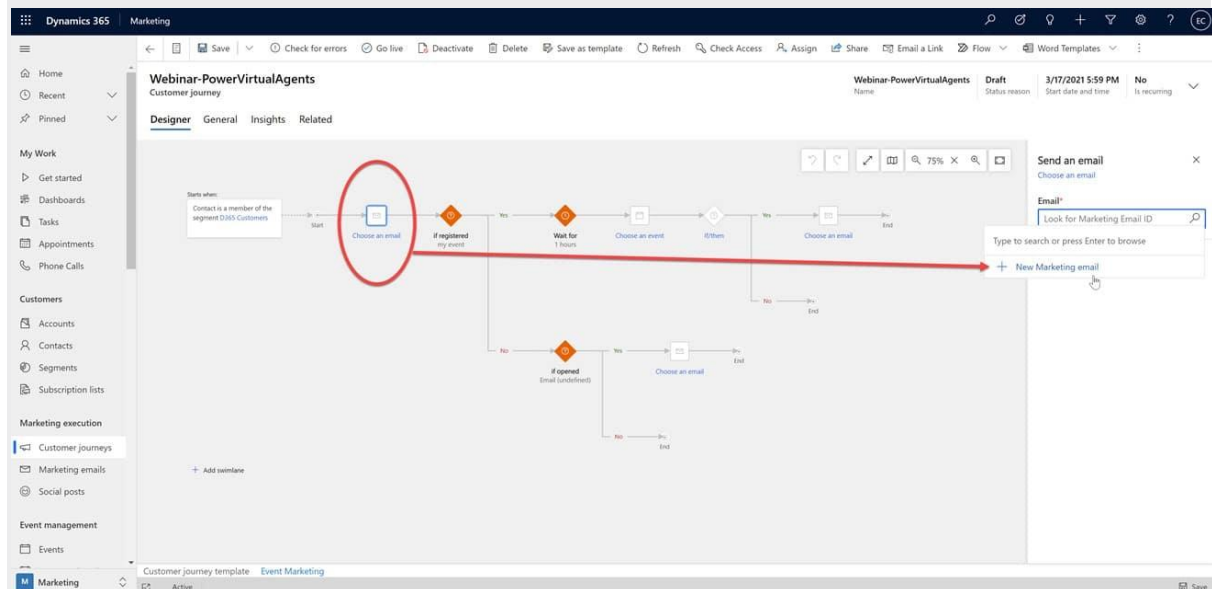

Screenshot 1: *New Marketing emails can be created without leaving the Customer Journey canvas.*

In previous versions, users had to jump between different areas of the App to setup related records like Marketing Emails and Events. This new enhancement provides a more intuitive and streamlined setup experience.

Change Layout Format

As marketers build out complex journeys, they can now change the layout format of the journey path diagram from horizontal to vertical orientation, according to their preference.
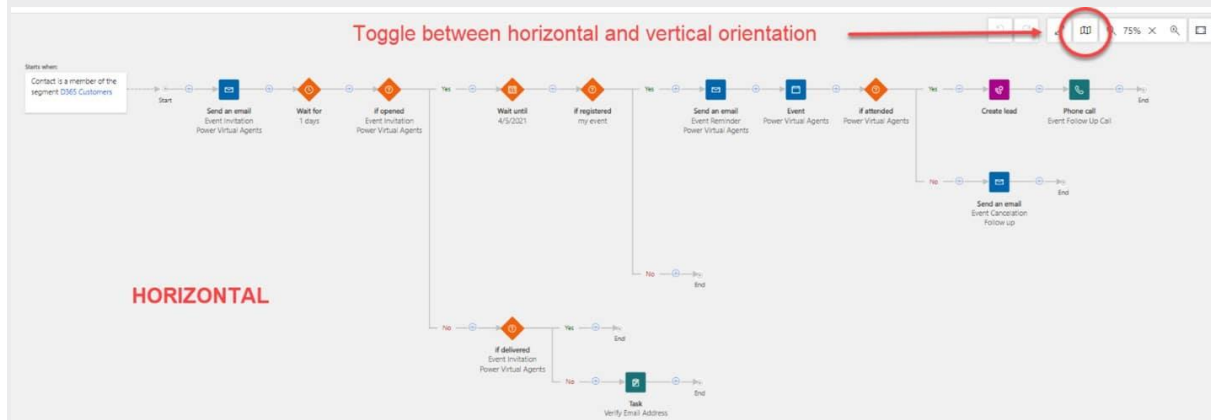
Screenshot 2: *Customer Journey – Horizontal Layout with new Layout Format button*
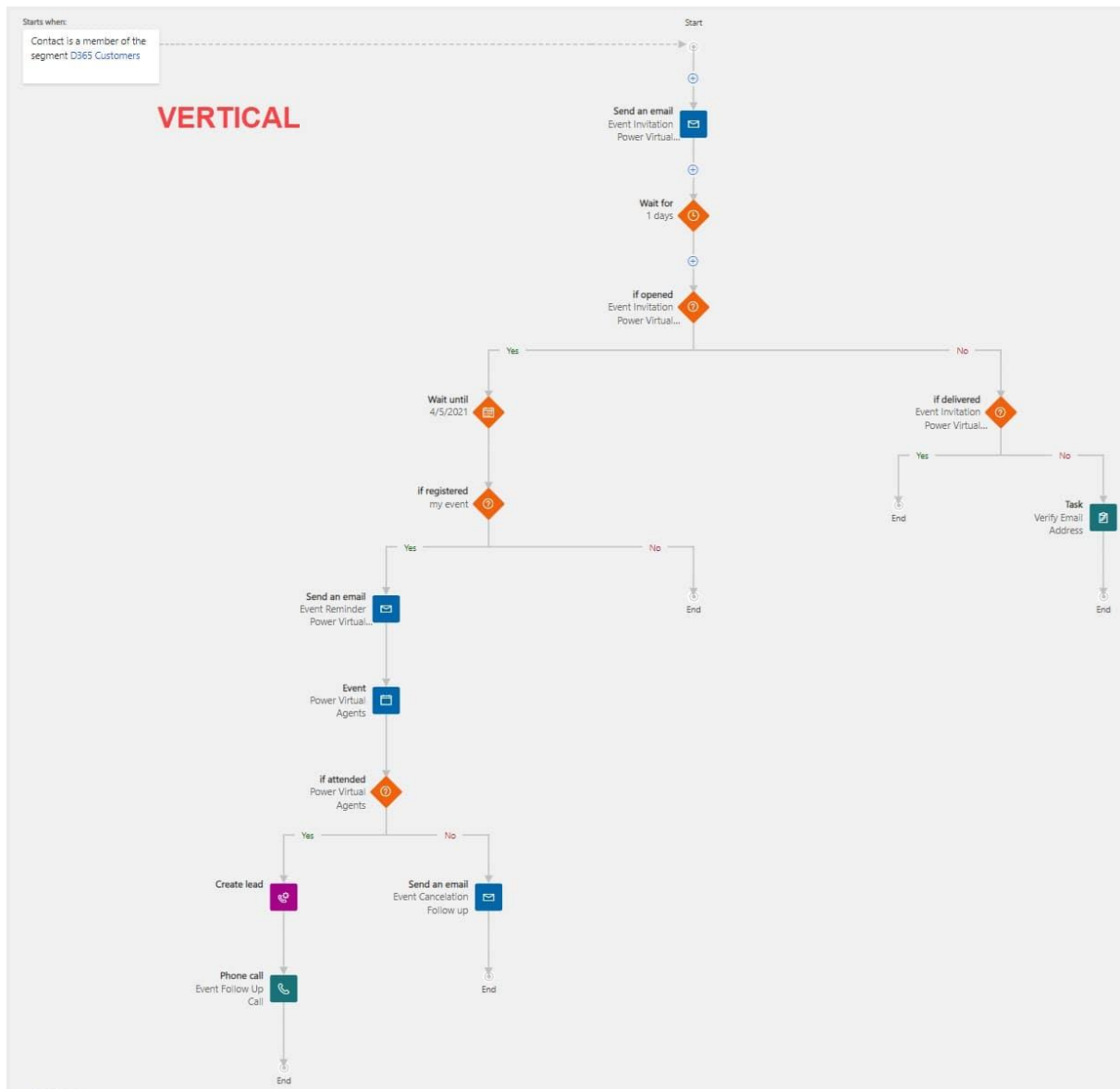
Screenshot 3: *Customer Journey – Vertical Layout example*

Depending on the complexity of the journey, and the number of branches in it, changing the layout can often make the diagram easier to read.

New Tiles

Tiles represent the steps of the Customer Journey. To support time-based journey actions, new Wait For and Wait Until tiles are available. These replace the older Scheduler tile. Wait For creates a delay for a specific time duration before sending the contact on to the next step in the journey. Duration can be defined by the number of Hours, Days, Weeks, or Months. Additionally, for Days durations, users can choose whether only weekdays, weekends, or all days should be counted. In Hours scenarios, users can specify a time period in which contacts are permitted to advance to the next step in the journey.

Screenshot 4: *Wait For tile*

As its name suggests, Wait Until creates a delay with a specified end date and time.
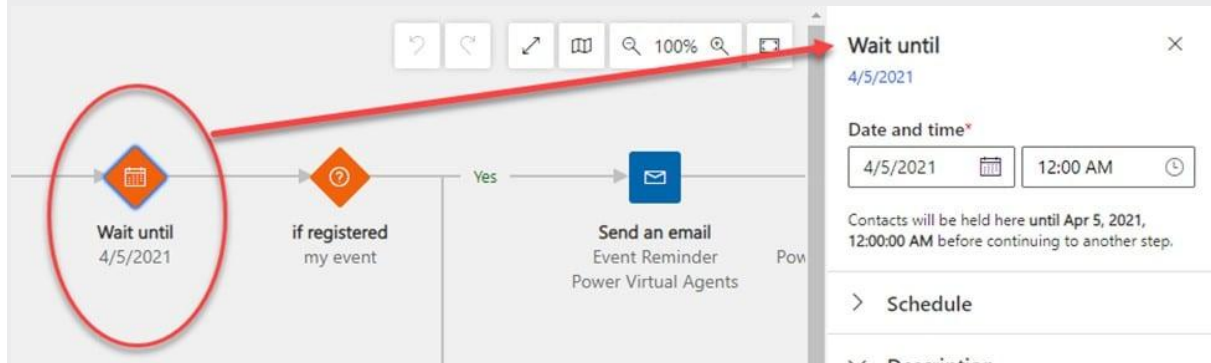
Screenshot 5: *Wait Until tile*

A new If/then tile splits the Customer Journey path into two branches, holding contacts until they meet a defined condition, or until a defined amount of time expires. Contacts who fulfill the conditions in time will follow the true (yes) path. Contacts who do not meet the conditions when the time expires will follow the false (no) path.
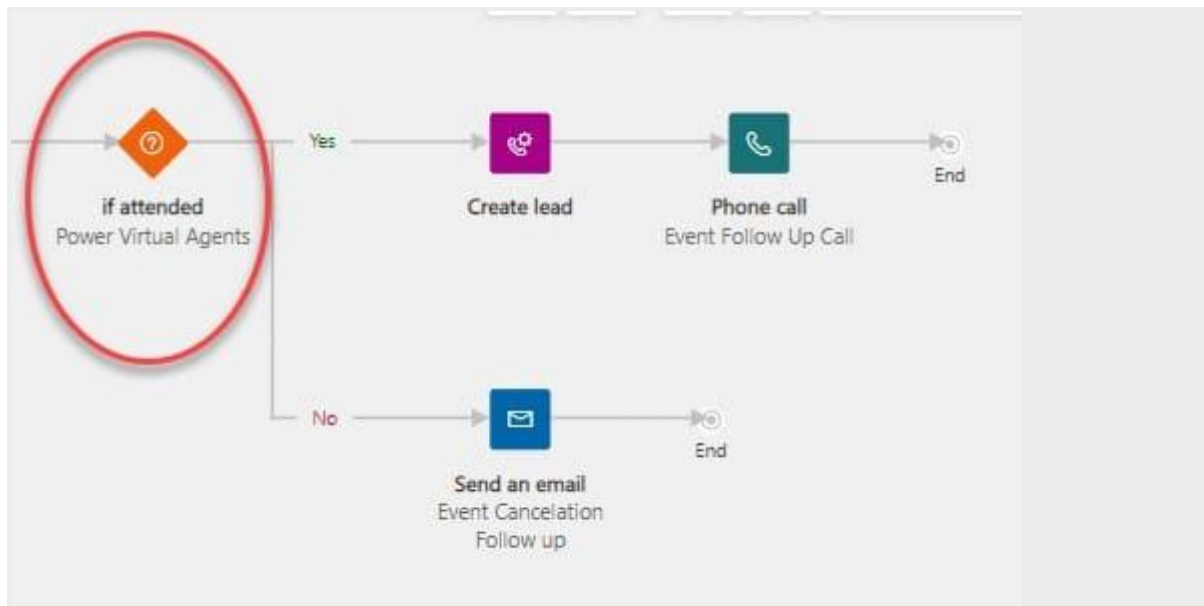
Screenshot 6: *If/then tile*

Engaging Customers Through Multi-Touch Campaigns

These new features, combined with the system's existing, prebuilt customer journey templates give marketers solid starting points to engage customers in a variety multi-touch, multi-channel campaigns for lead nurturing, event management, new customer onboarding and more.