

Dynamics 365 Real-time marketing (RTM) - Engage customers in real-time

Dynamics 365 FastTrack
Architecture Insights

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Nov 2022



Agenda

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- RTM overview
 - OBM vs. RTM
 - Getting started with RTM: engage customers in real-time (DEMO)
 - Resources

Real Time Marketing Overview



Digitally transformed customer experiences – the elusive differentiator

Even though

86%

of buyers will pay more for a better customer experience

Only

1%

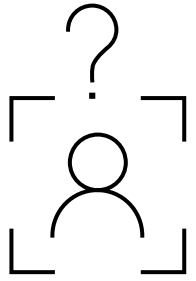
of customers feel that companies consistently meet their expectations

Source: <https://www.linkedin.com/pulse/customers-willing-pay-more-great-customer-experience-brian-kramer>

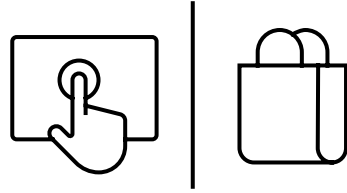
Source: CEI Survey



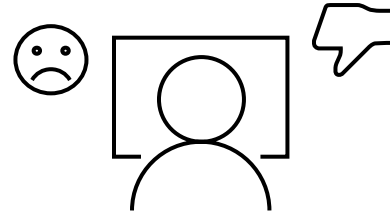
Disjointed customer experiences



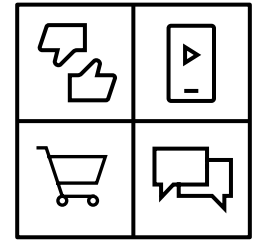
Companies don't understand their buyers in an **actionable way**



Digital, physical, and human experiences are **disconnected**



Inability to engage in **moments that matter**



Multiple departments are creating **siloed experiences**

Our approach



Understand your customer

Combine and enrich all your data in real time and leverage AI-driven insights to predict customer intent.



Personalize every experience, across every channel

Deliver customer-led personalization with AI-assisted orchestration across all touchpoints.



Maximize ROI and (business) impact

Accelerate time to value with an integrated marketing solution. Optimize budget allocation across channels.

Protect customer privacy and your brand

Maintain full ownership of data, backed by industry-leading security, compliance and privacy

Dynamics 365 Marketing with Real-time customer journey orchestration

The future of marketing and the future of customer experience



Digitally transformed experiences

Privacy first moment-based experiences



Convergence of B2B & B2C



Convergence of productivity and business applications

OBM vs. RTM

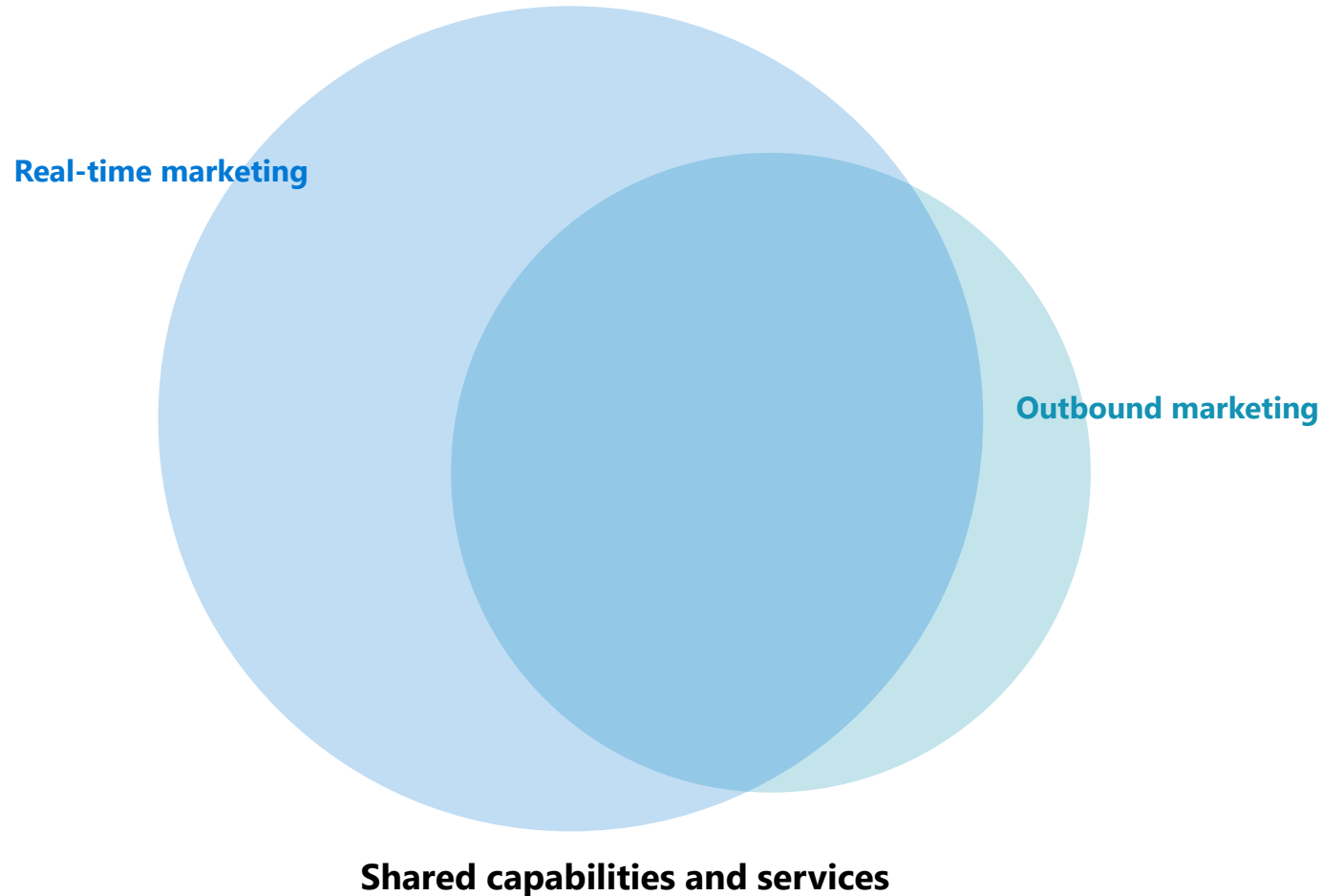
Key Capabilities

Real-time marketing only:

- Real-time journey orchestration
- Real-time triggers
- Custom triggers
- Trigger on change to Dataverse
- Orchestrate to leads
- Power Automate integration
- Advanced real-time segmentation
- AI-powered optimization
- Advanced analytics
- Brand profiles
- Text (SMS) messaging
- Push messaging

Outbound marketing features coming to RTM:

- B2B capabilities, e.g., Lead Scoring*, Forms*, Pages
- Social Posting
- Custom channels*



*This capability will be in public preview and/or generally available in Real-time marketing within the [2022 release wave 2, October 1, 2022 – March 31, 2023](#).

Where do I start?

The short answer is: **use Real-time marketing in most cases.**

Both Real-time marketing and Outbound marketing can be used for:

- ✓ marketing automation
- ✓ segment-based journeys
- ✓ sending personalized emails
- ✓ helping you to be compliant
- ✓ providing analytics that generate insights to help you take the right action



Use Real-time marketing when your focus is...



driving immediate customer engagement

Real-time, customer-led, trigger-based journeys to engage in the moments that matter



text, push notifications, or custom channels

Reach customers on their mobile devices or in custom channels*. Reply to texts with compliance-related keywords. Quickly convey offers and other messages by using push notifications. Leverage any of these in your real-time journeys



targeting larger audiences

Scale up to 300-million interactions per month with 100-million contacts per month



creating deep personalization

Personalize email, text, and push notifications quickly and easily by using pre-defined dynamic text, or use conditional content for personalized content and images

*Real-time marketing will offer custom channel capabilities starting with public preview in Oct '22 and general availability in Dec '22
[2022 release wave 2, October 1, 2022](#)

Use Outbound marketing when your focus is...



collecting and managing leads

Capture leads* that you can score, grade, and then hand off to sales.



posting to social channels

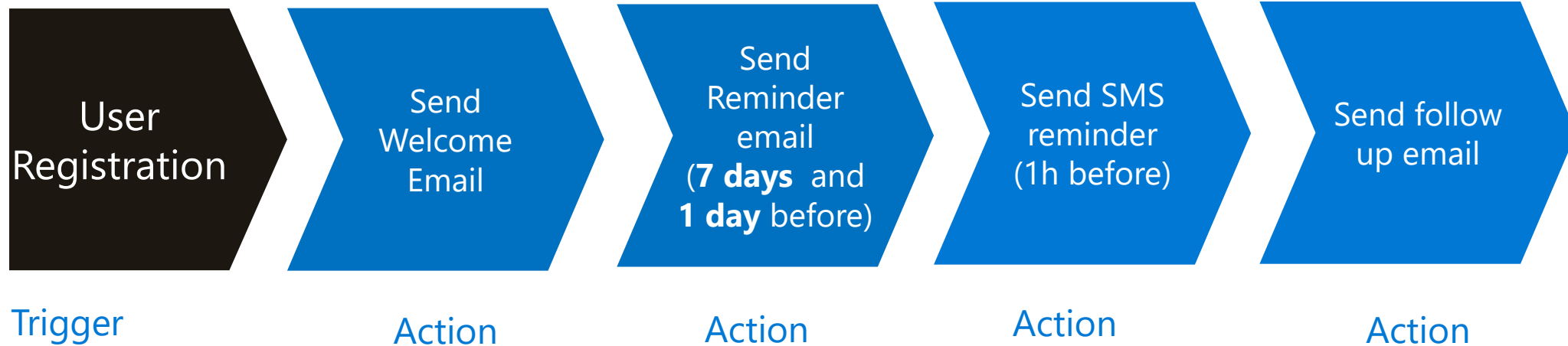
Schedule and post messages directly to your organization's accounts on social media sites.

*This capability will be in public preview and/or generally available in Real-time marketing within the 2022 release wave 2, October 1, 2022 – March 31, 2023.

DEMO

Customer Problem

Register and check-in customers for an upcoming event





RESSOURCES

Ressources

Quick Start with Real Time Marketing

[Install real-time customer journey orchestration \(Dynamics 365 Marketing\) | Microsoft Learn](#)

Real-time marketing overview

[Real-time marketing overview \(Dynamics 365 Marketing\) | Microsoft Learn](#)

What's new and planned for Dynamics 365 Marketing

[New and planned features for Dynamics 365 Marketing, 2022 release wave 2 | Microsoft Learn](#)

Frequented Asks Questions (FAQ) about Real Time Marketing

[Troubleshoot real-time marketing \(Dynamics 365 Marketing\) | Microsoft Learn](#)

Thank you