

# PACC – D365 Marketing

Dynamics 365 FastTrack  
Architecture Insights

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# Elevate customer experiences



## Understand every 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

# Themes for 2022 release wave 1

**Collaborate** using the full  
power of your teams  
across departments, and applications



**Personalize** interactions  
with ease  
using the power of data and AI



**Engage** in the  
moments that matter  
with real-time journey orchestration



Engage in  
moments that  
matter

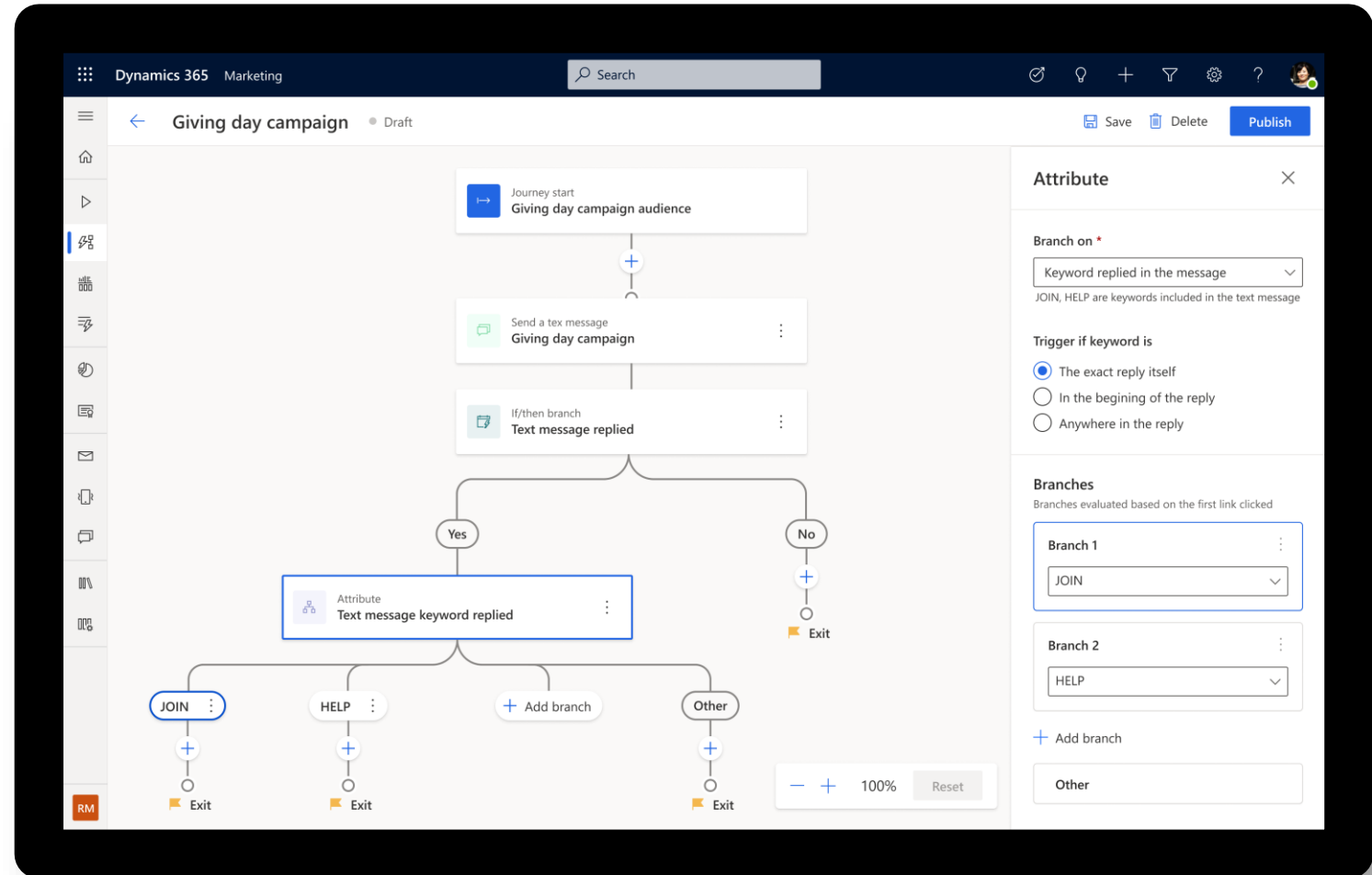
2022 Release Wave 1



# Easily engage based on customer SMS responses

Branch your journey based on the SMS keyword response received from your customer

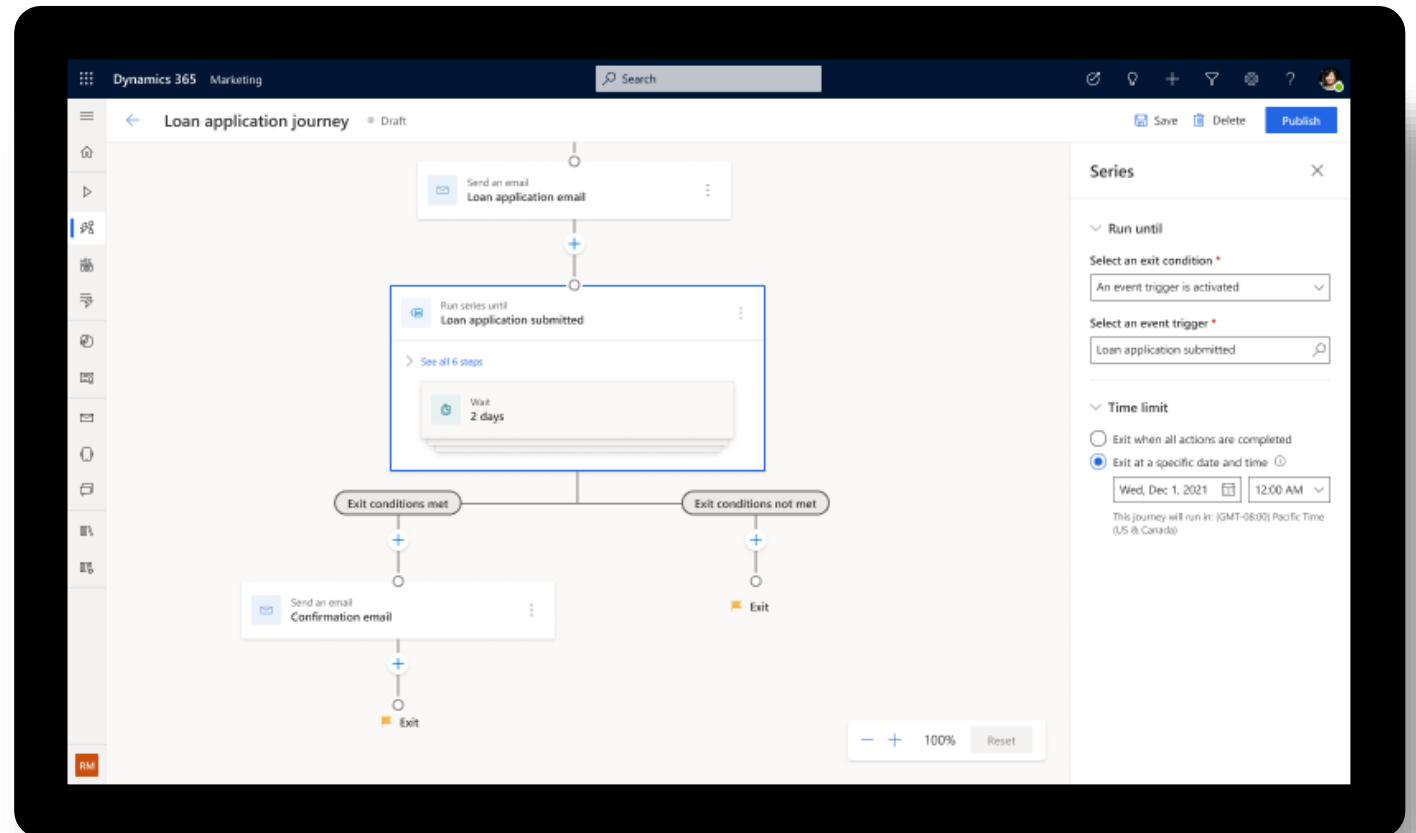
- Set up communication keywords in a unified SMS admin experience
- Define how keywords will be used in the journey
- Set up SMS replies for unrecognized keywords



# Simplify journey management by consolidating repeat steps to drive customer action

Encourage customer action by sending reminders and repeating messages until a qualifying event or activity occurs

- Create journeys that include a set of messages such as reminders until a qualifying event/activity occurs.
- Messages can end based on the customer taking an action or based on a certain date or time
- Increase productivity by simplifying logic, increasing readability and lowering maintenance

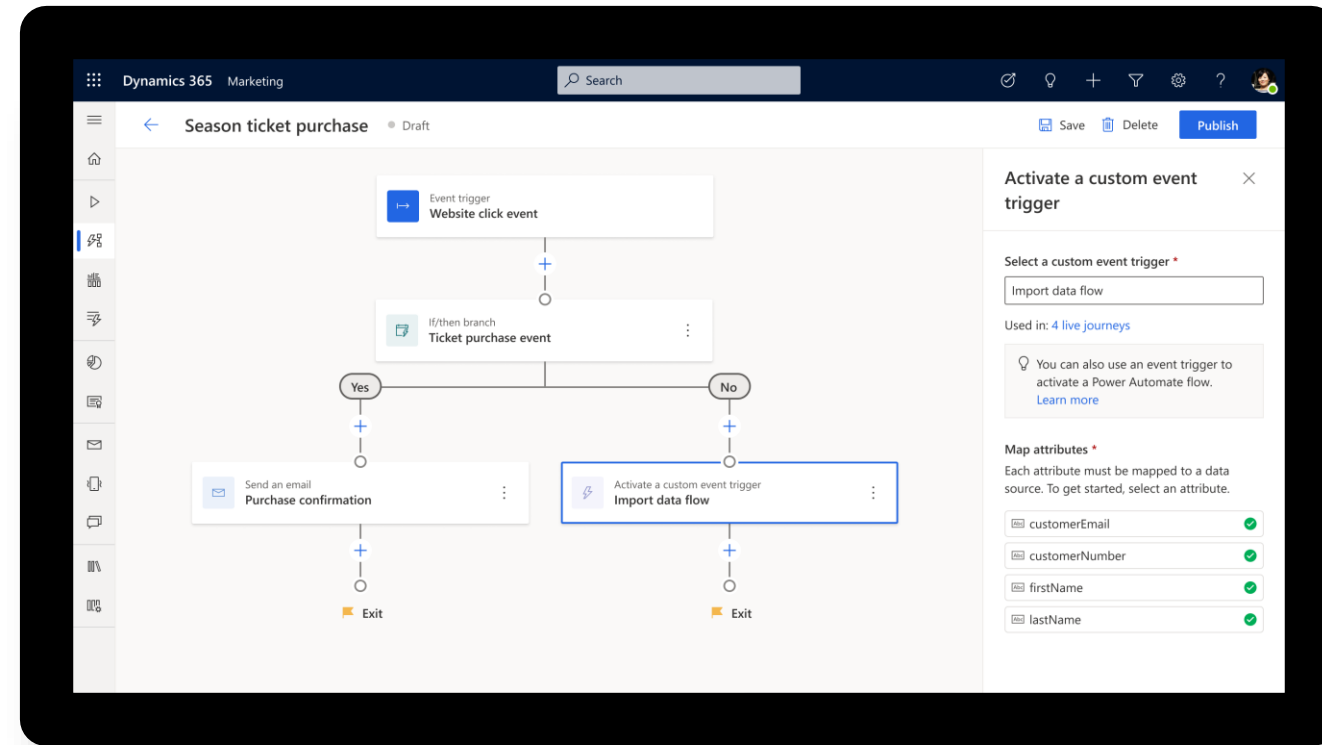




# Engage customers in endless new ways and take action based on your unique business needs

Leverage the unmatched flexibility of Microsoft Power Automate to create customer journeys connected to a wide range of other business systems

- At any point in a customer journey, you can connect external business systems such cloud apps and services to deliver unique experiences
- Leverage the *world's #1 automation platform\** ecosystem of 400+ connectors, 100s of triggers, and 1000s of actions
- Connect journeys together or have nested journeys to simplify overall management



*\*Per Gartner 50% of CIOs plan to use Power Automate, more than all other automation platforms combined*



# Target customer behaviors more selectively by starting journeys with qualifying conditions

Create individualized journeys by adding pre-qualifying conditions to deepen personalization

- Gain more control over your journeys by filtering triggers that are used to start, exit, branch, or measure journey goals.
- Add one or more filter conditions on top of an event trigger to further qualify who can enter a customer journey.

The screenshot displays the 'Create a new journey' form in Microsoft Dynamics 365 Marketing. The form includes a search bar at the top right. The 'Name the journey' field is filled with 'Customer case: High-priority incident'. Under 'Choose the type of journey', the 'Event-based' option is selected. The 'Select an event trigger' dropdown shows 'Case added'. Below this, there is a 'Conditions' section with a red border, containing three dropdowns: 'Priority' (set to 'High'), 'Equals', and 'High'. There is also an 'Add condition' button at the bottom of the conditions section.



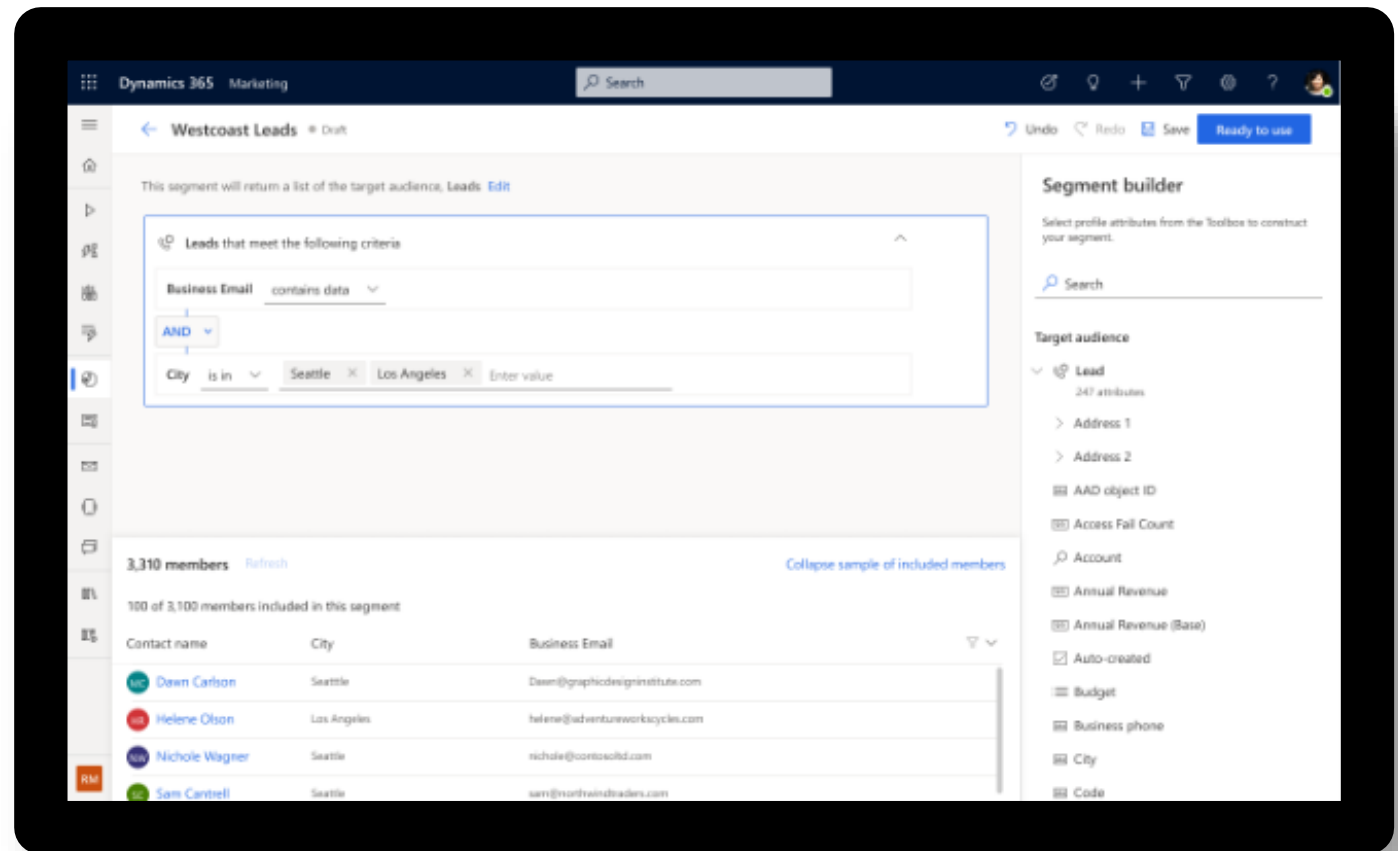


# Target the right audience quickly and easily with the reimagined segment builder

PREVIEW

Gain greater flexibility by creating segments for contacts *and* leads in the new segmentation builder

- Directly create segments based on attribute data for both contacts and leads.
- Discover and search across all attributes in the right pane and add them to your queries.
- Preview and estimate the number of segment members as part of your segment creation process.





# Suggested Practices – Real-time Marketing

# Initial Setup

## Licensing Considerations



- Ensure sufficient marketing contacts acquired and quota matches estimated consumption
- Assess the need for additional environments to support the full Application Life-cycle management
- Assess if storage needs are matching the entitled limits
- Portals are licensed separately

## Fair Use Limits Policy



- Confirm estimated peak number of interactions do not exceed the limits
- Check data sync limits and the expected number of rows (per table and total)
- Check segment member limits (per active journey)



# E-Mail Marketing

## Clean Content



- Unsubscribe links and your organization's physical street address in the message body
- Leverage Spam Checker feature

## Authenticate



- Sender Policy Framework (SPF) : Managed by Microsoft
- DomainKeys Identified Mail (DKIM) : Managed by Microsoft
- Link e-mail domain to D365 Marketing sending domain

## Prevent Hard-Bounce



- Dynamics 365 Marketing automatically stops sending to hard-bouncing addresses for 6 months

## Don't use Purchased mailing lists



- Personalize Emails to specific accounts and stakeholders

## Consistent Volume



- D365 Marketing automatically balances volume
- +1 million recipient should start small and ramp up over time



# E-Mail Marketing

## Recommended volume



- Outbound: 10,000,000 emails per month (1,000,000 daily max)
- Real-Time: 100,000,000 interactions per month (3,333,000 daily max)

## Recommended size



- Recommended E-Mail Size: 100 KB, no attachments
- Max image size: 5 MB (GIF, BMP, JPEG, PNG are supported)

## Leverage Previews & Test Send



- Test and evaluate e-mail design before using within campaign

## Leverage Mini Customer Journeys



- Test e-mails with complex content and subscription pages



# Customer Journeys

## Choose the Right Journey Type for the Scenario



- Segment Based: Create outbound journeys like sending out announcements or a nurture campaign
- Event Based: React to customers' actions in real time.

## A/B Testing



- Try each e-mail design on a different subset of your audience and maximize engagement

## SMS & Push notification channels



- Utilize other communication channels
- Use channel optimization that allows AI model to pick the optimal channel for your customers



# Segmentation

## Segments



- Use dynamic segments whenever possible
- Don't have more than few hundreds of active segments – 1.000 segments is the fair use policy limit

## Business unit scoping



- Enable scoping for BU specific contacts / BU specific marketing

## Data Sync



- Initial sync may take some time with high volume data
- High volumes of frequent changing records can cause delays, avoid them as much as possible

## Utilize Customer Insights



- Use Customer Insights when there is a need to ingest data from multiple 3<sup>rd</sup> party sources and complex segmentation logic
- Customer Insights segments won't create new contacts in Marketing





# Application Life-cycle Management

Same Marketing version everywhere



- Test latest version using dev environment, start upgrade from dev
- Do not deploy Marketing related customizations before having same versions in every environment

Move Configuration Data (Journeys, E-Mails..)



- Configuration Migration Tool/Dynamics 365 Web API can be used
- Statuses will be “draft” instead live
- Interaction data cannot be migrated

Backup/Restore/Copy



- Follow official guideline
- Regular D365 Backups do not include interaction data
- Interaction data from your source environment (such as email clicks or website visits) won't be available to the target environment.

Thank you