

Transition from Outbound to Real- time Marketing

Dynamics 365 FastTrack
Architecture Insights

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Agenda

-
- Transition Playbook Walkthrough
 - Q/A

Purpose and scope

THE SITUATION




Dynamics 365 Real-time Marketing has been launched in 2021 and the feature has been in rapid development since, and it reached to a parity stage with the widely used Outbound Marketing. Customers who are currently using Outbound Marketing now have the opportunity to transition to the D365 Real-time Marketing product. This guide provides information on the migration path from Outbound to Real-time Marketing and highlighting important considerations that should be made.

PURPOSE

This guide aims to provide a brief understanding of the main features available inside Dynamics 365 Real-time Marketing and guide the customers in their transition from Outbound to Real Time Marketing.

Content in this guide requires a basic understanding of Dynamics 365 Marketing solution and expertise in marketing practices

Audiences:

-  Customer Solution Architects
-  Partner Solution Architects
-  FastTrack Solution Architects

In summary, this guide will help you:

- ✓ Understand the benefits of the Real-time Marketing
- ✓ Functional comparison between Outbound and Real-time Marketing
- ✓ Develop a Strategy for transition
- ✓ Understanding of items and techniques that would need transitioning

INSIDE THIS PLAYBOOK:

Chapter 1 Introduction

Ensure functional cover for the transition

Chapter 2 Explore

Detail the transition for each feature in the scope

Chapter 3 Transition

Plan and execute

Chapter 1 Introduction

Understand functional cover of Real-Time Marketing

What Dynamics 365 Real-time Marketing offers?

- Dynamics 365 Real-time Marketing enables organizations to manage outgoing communications to their customers both as a group or individually, reacting to customers' actions in real-time or in batch.

Why transition to Dynamics 365 Realtime Marketing?

- Can start journeys both out of segments and on triggering events
- Additional first party channels with SMS and Push notifications
- Richer email editing experience
- Larger scale of communications supported

What is new and different?

- New and enhanced features in RTM

Resources

Chapter 2 Explore

Detail the Transition for Each Feature

Understand the Functional Design

- Identify the existing Outbound Marketing functional components in use and equivalent Real-time Marketing features
- Understand the similarities and differences between modules

Opportunities for improvements

- Which additional features will be available in Real-time Marketing and how to best utilize these features

Analyze components to be transitioned

- Define your communication channels
- List the marketing artefacts needed in the transition

Train users, super users and administrators on new processes

Resources

Chapter 3 Transition

Plan and Execute

Approach

- Determine transition approach for your organization.
- Establish a plan

Transition Marketing Artefacts

- Build your library
- Transfer customer touchpoints and related components
 - Forms
 - Emails & Content Block
 - SMS and Push Notifications
 - Triggers
 - Subscription lists to Consent Centre

Transition Marketing Automation Process

- Create segment/trigger journeys
- Test your journeys

Resources

Chapter 1: Introduction



Leveraging a data driven approach requires new tools...

Shift in strategy

Yesterday

Tomorrow

Megaphone messaging

Audience of one

Big bang campaigns

Moments-based marketing

Gut decisions

Insight-based decisions

Demand generation

Build loyalty and lifetime value



Dynamics 365 Real-time Marketing

- Real-time marketing journeys allow marketers to set the Goals and measure the progress through a journey
- Trigger catalog with built-in triggers and framework to create custom events for triggering customer journeys in real time
- Triggers can be based on events in Dynamics or integrated with external applications (for example, websites)
- Designed to target leads, contact and D365 Customer Insight profile
- Hyper-personalize customer journeys using data and insights from Dynamics 365 Customer Insights
- Author personalized emails quickly and easily using the new email editor
- Create and send personalized push notifications and SMS messages
- Turn insights into relevant action with AI-driven recommendations for content, channels, segmentation, and analytics.
- Search, manage, and tag your digital assets with a new centralized asset library
- Improve journey effectiveness with a built-in cross-journey aggregate dashboard

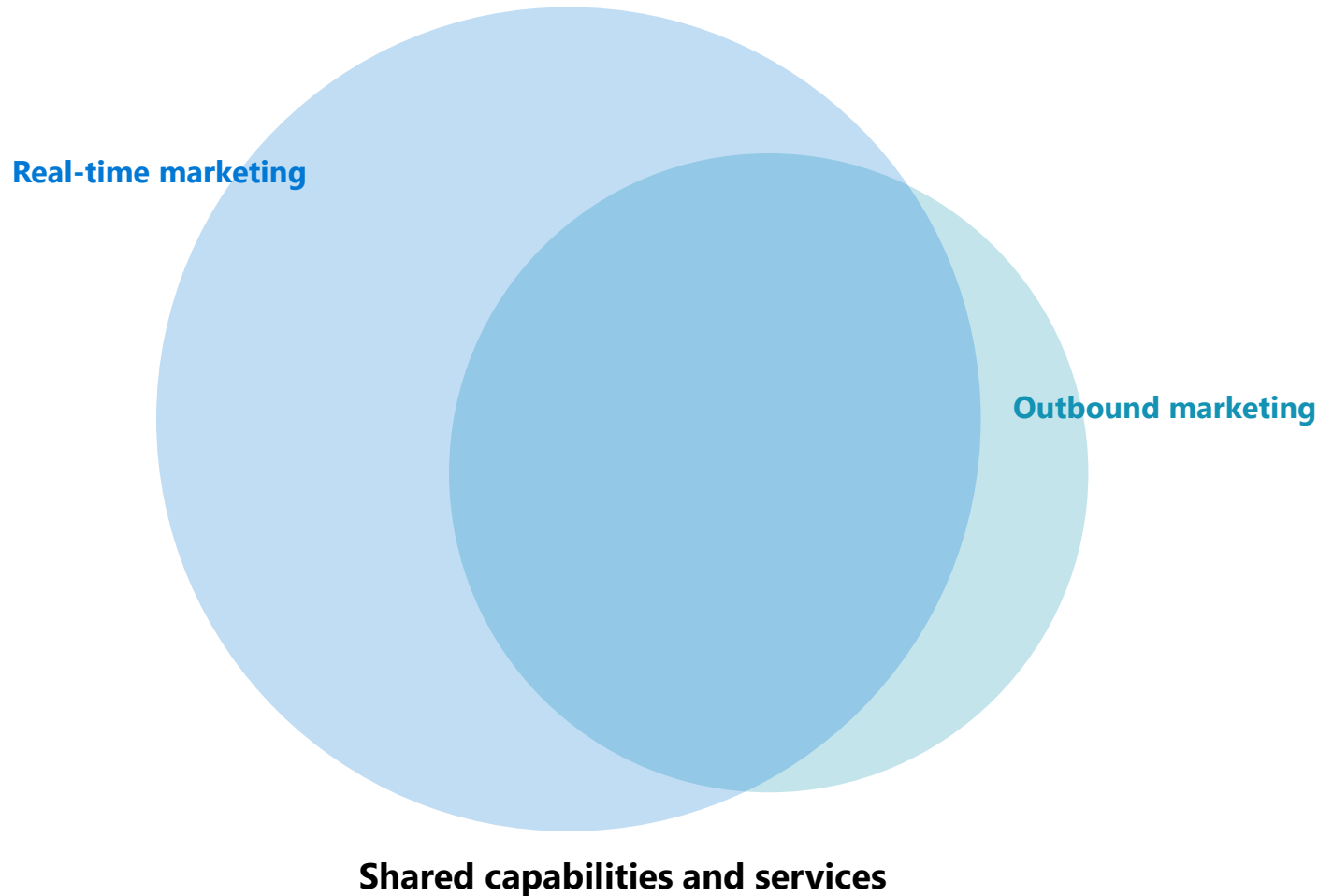
Key Capabilities

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*

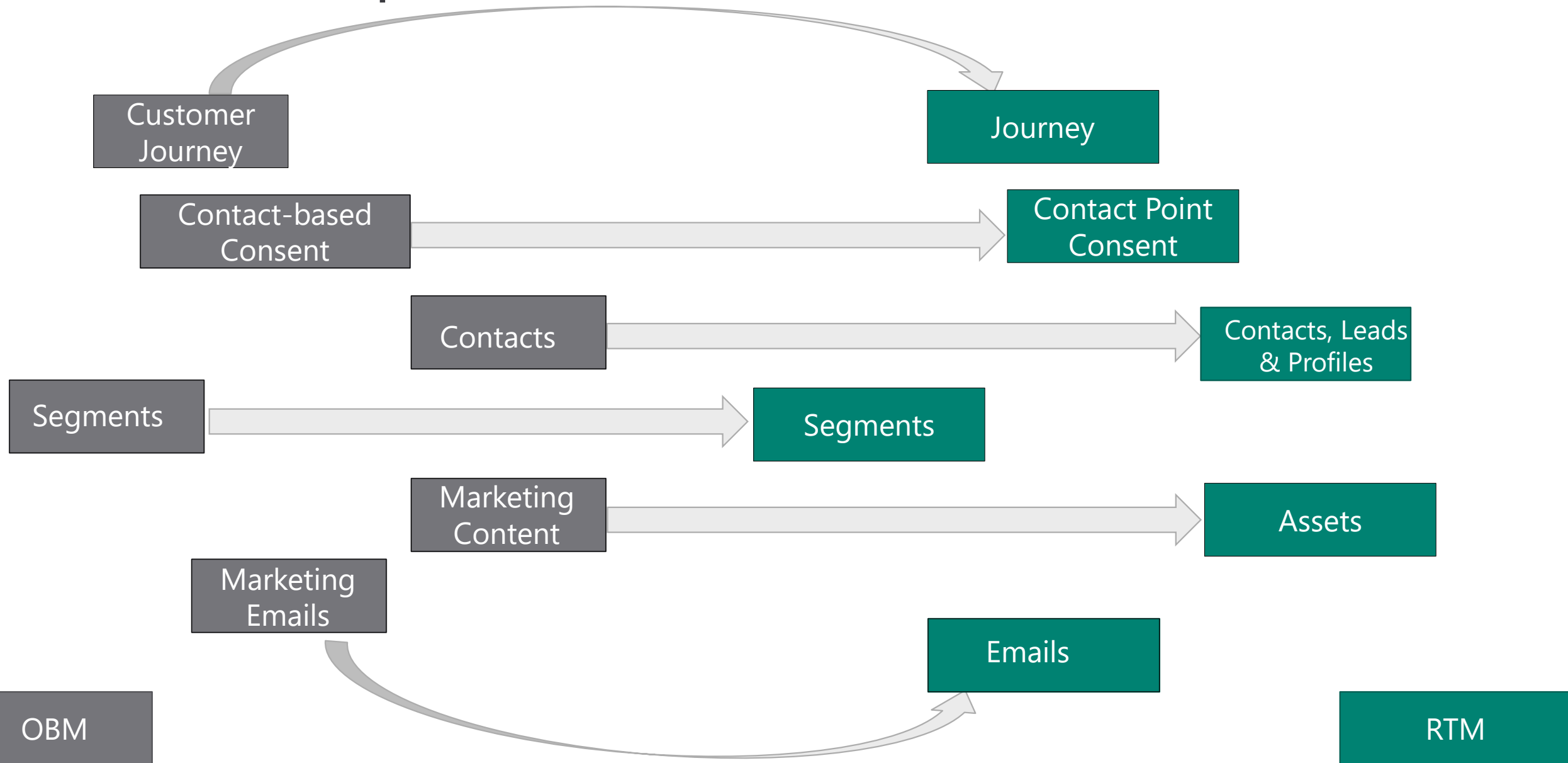


*This capability will be in public preview and/or generally available in Real-time marketing within the [2022 release wave 2, October 1, 2022 – March 31, 2023](#).

Main features comparison between the applications

		Outbound	Real-time
Communication Planning	Segment-based journey	✓	✓
	Real-time journey	N/A	✓
	Subscription Management	✓	✓
	Consent Center		✓
Marketing Artefacts Designer Features	Email Design	✓	✓
	Conditional Content		✓
	Code-based personalization	✓	
	Code-free personalization		✓
	Content Block	✓	✓
	Asset Library	✓	✓
	Landing Pages	✓	ROADMAP
	Web forms	✓	ROADMAP
Reporting & Analytics	Web intelligence / analytics	✓	✓
	Lead Scoring and Grading	✓	ROADMAP
Custom Channel Support	SMS support	Custom Channel	✓
	Push Notification	Custom Channel	✓
	Social post	✓	✓

Understand the equivalent feature areas



Many new features combined to allow you to engage with customer at specific moments.

Key Advantages

Triggered based customer journeys

- Support engagement during moments that matter through triggered communications
- Support any type of custom trigger that journey can act upon

Two-way SMS

- Native outbound text message channel to reach customers directly on their mobile devices
- Journey can act upon based on your customer's response to your text messages

Push notifications

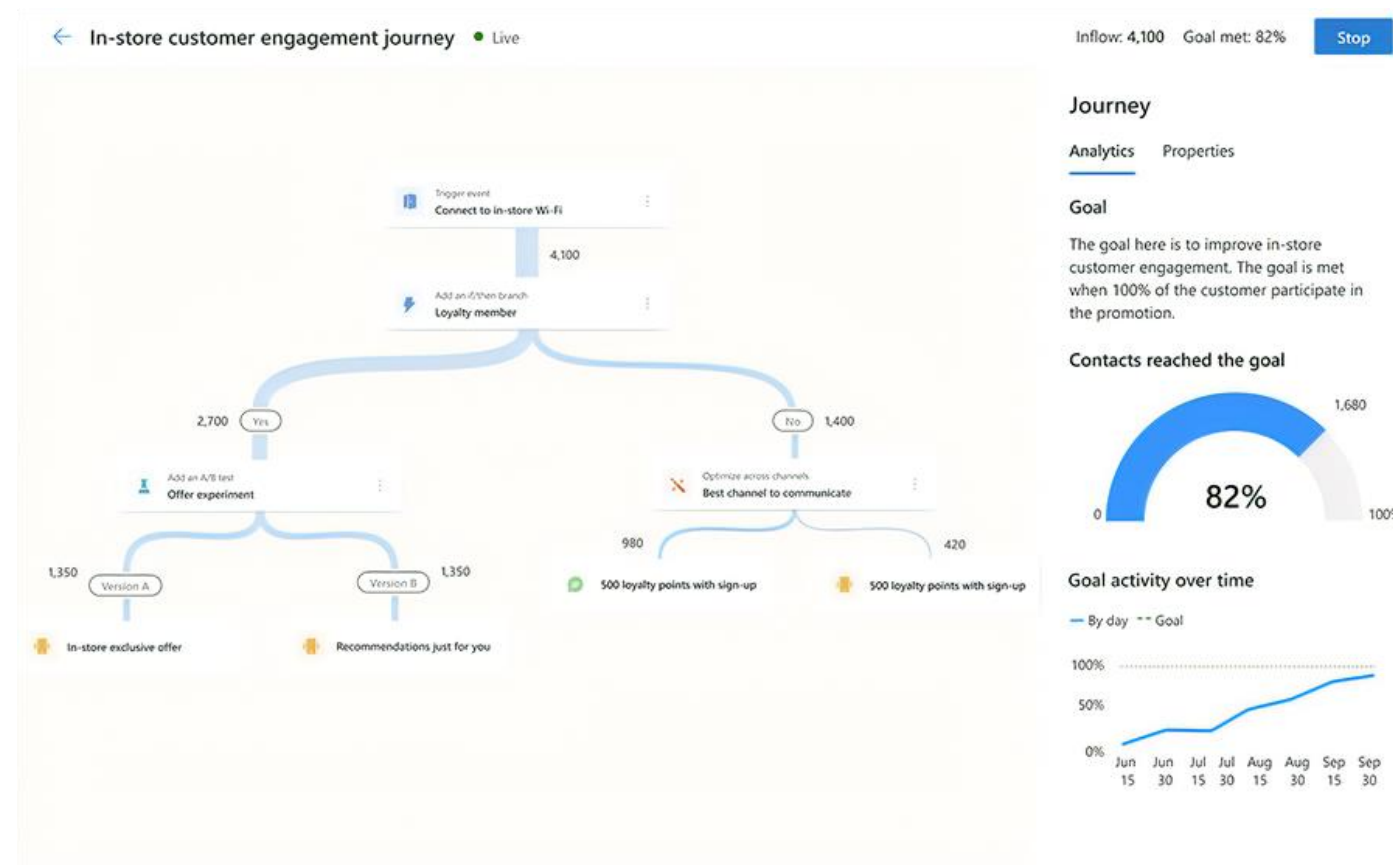
- Support to quickly convey offers, messages, or other information directly to users of your app

AI driven channel optimization

- Connect with customers on the channels they use the most by AI model

And more...

- Enhanced Email and content designer
- Enhanced segmentation engine
- Native integration with Dynamics 365 Customer Insights
- Ability to market to Leads and Customer Insight Profiles
- Higher throughput and volume support
- Journey branching supporting more than 2 branches



Enhanced Segments in RTM

- RTM Marketing Segments are recently got GA and we will continue to add more features in coming months.
- Real-time marketing can use segments directly from outbound marketing and Customer Insights
- You can also build segments directly within the real-time marketing area which has enhancements like:
 - Easy-to-use logic builder that doesn't require deep understanding of data structure and logical operators.
 - Ability to include sub-groups into your segment query
 - Preview the estimated segment size and membership before you mark your segment as "Ready to use" in customer journeys.
 - At any point in time, you can make your segments either Static OR Dynamic with simple flag switch. You can also edit the query at any point in time.
- Real-time segment designer doesn't allow user to create behavior segment at this moment.

RTM Marketing Segments are GA now.

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Qualifying leads • Draft

This segment will return a list of the target audience. Leads Edit

Group 1

Industry (Account) Is Consumer Services

Account > Lead via Parent Account for lead Edit

+ Add a subgroup

118 members Refresh Hide sample of included members

100 of 118 members included in this segment

Name	Email
Brian Jackson	brian_jackson@contoso.com
Joan Hayes	joan_hayes@contoso.com
Margaret Ward	margaret_ward@contoso.com
Megan Hernandez	megan_hernandez@contoso.com
Julie Howard	julie_howard@contoso.com
Adam Russell	adam_russell@contoso.com

Segment builder

Select attributes from below to construct your segment.

industry

Target audience

- Lead 2 attributes found
- Industry
- Industry

All tables

- Account 1 attributes found
- Industry
- Event Registration 2 attributes found
- Session 1 attributes found

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Qualifying leads • Draft

Group 1 uses and

Company size (Event Registration) Is 10001 or more

Event Registration > Contact via Contact > Account via Primary Contact > Lead via Parent Account for lead Edit

and

Group 1.1 uses or

Industry (Account) Is Financial

Account > Lead via Parent Account for lead Edit

or

Industry (Account) Is Consumer Services

Account > Lead via Parent Account for lead Edit

+ Add a subgroup

Segment builder

Select attributes from below to construct your segment.

industry

Target audience

- Lead 2 attributes found
- Industry
- Industry

All tables

- Account 1 attributes found
- Industry
- Event Registration 2 attributes found
- Industry
- Years in industry
- Session 1 attributes found


React to customers' action in real time

- Trigger can be any real-world interactions like walking into a store and connecting to Wi-Fi, virtual interaction such as visiting a shopping website, etc.
- Application includes out of the box triggers like "Marketing Event Registration" which ready to be used.
- Trigger can be defined for Dataverse record change without code.
- Custom triggers can also be created for when a customer interacts with a website/app that sends the signal to Dynamics. This can include any source (such as a website, an IoT device, an app, a service, etc.) using small snippets of code.
- Journey manager can define the journey start date and time.
- Journey manager can also specify whether a customer can repeat the journey and how soon they repeat it if they perform the trigger again.

Create a new journey


Name the journey

Choose the type of journey



Trigger-based

Respond in real time to customer actions, like form submitted, cart abandoned, and purchase made.



Segment-based

Reach out to targeted audiences, like loyalty members, with high-impact, personalized journeys.

Choose a trigger *

CreateCancel

Enhanced Segment based journey

- Journey builder can set the frequency to run either one-time or audience can repeat the journey based on the frequency you have set
- Journey manager can exclude the audience from another segment
- Journey manager can use segment to a condition to branch the journey
- Marketers can use suppression segment into exist criteria for the people who they wishes to not continue the journey
- Another additional and very powerful feature that comes with RTM is the ability to integrate with [Dynamics 365 Customer Insights for segmentation](#). You can directly use segments created in CI into RTM journey.

Create a new journey

Name the journey

Journey 2

Choose the type of journey



Trigger-based

Respond in real time to customer actions, like form submitted, cart abandoned, and purchase made.



Segment-based

Reach out to targeted audiences, like loyalty members, with high-impact, personalized journeys.

Select a segment *

Select the frequency

- ☒ A one-time journey with a static audience
- ☐ A one-time journey where newly added audience members can start any time
- ☐ A repeating journey where all audience members repeat the journey every:

1

days



Time zone ⓘ

Set the time zone for the journey.

(GMT) Coordinated Universal Time [Edit](#)

Start *

Select a date



12:00 AM

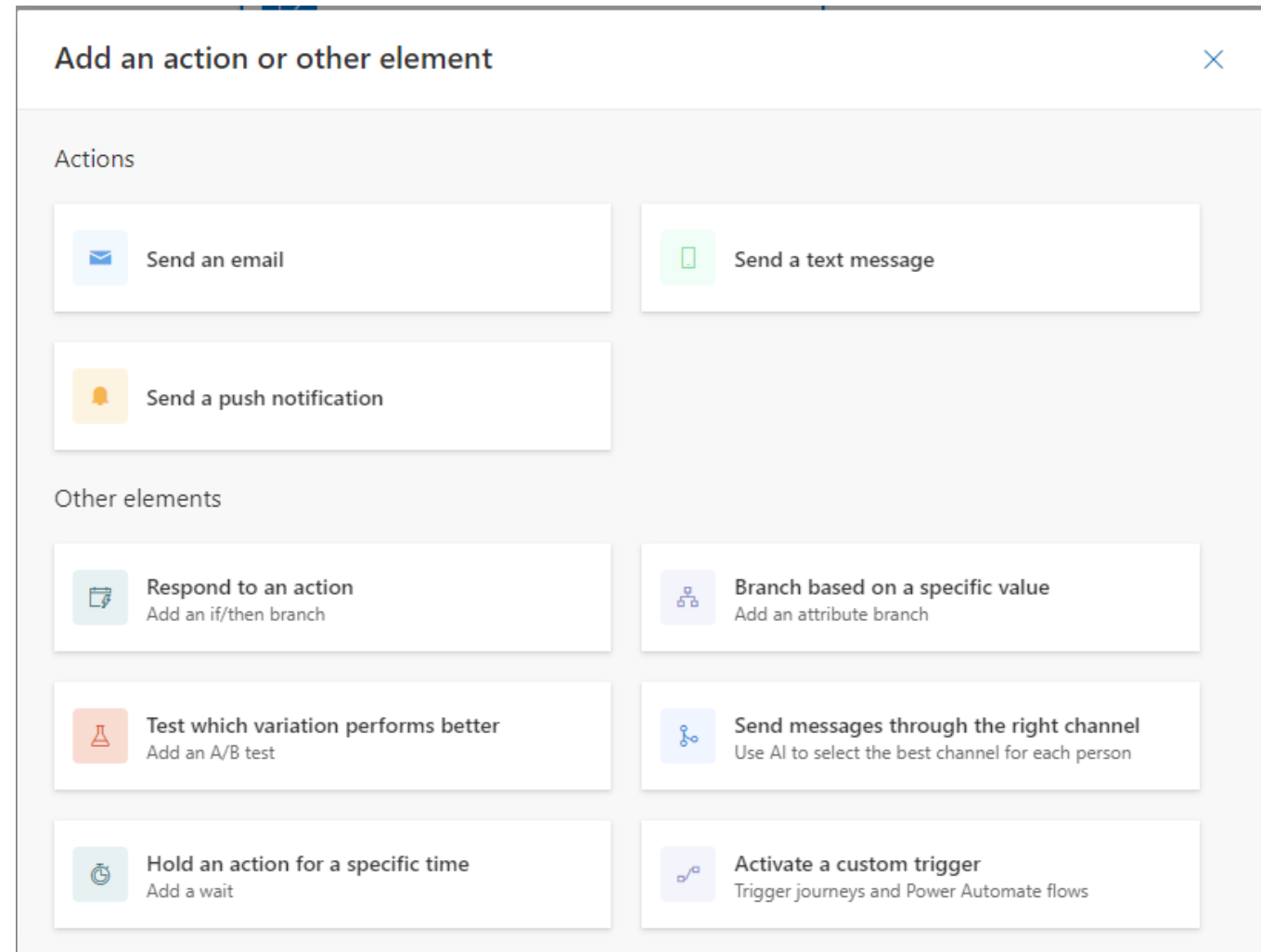


Create

Cancel

Enhanced features in RTM journey designer

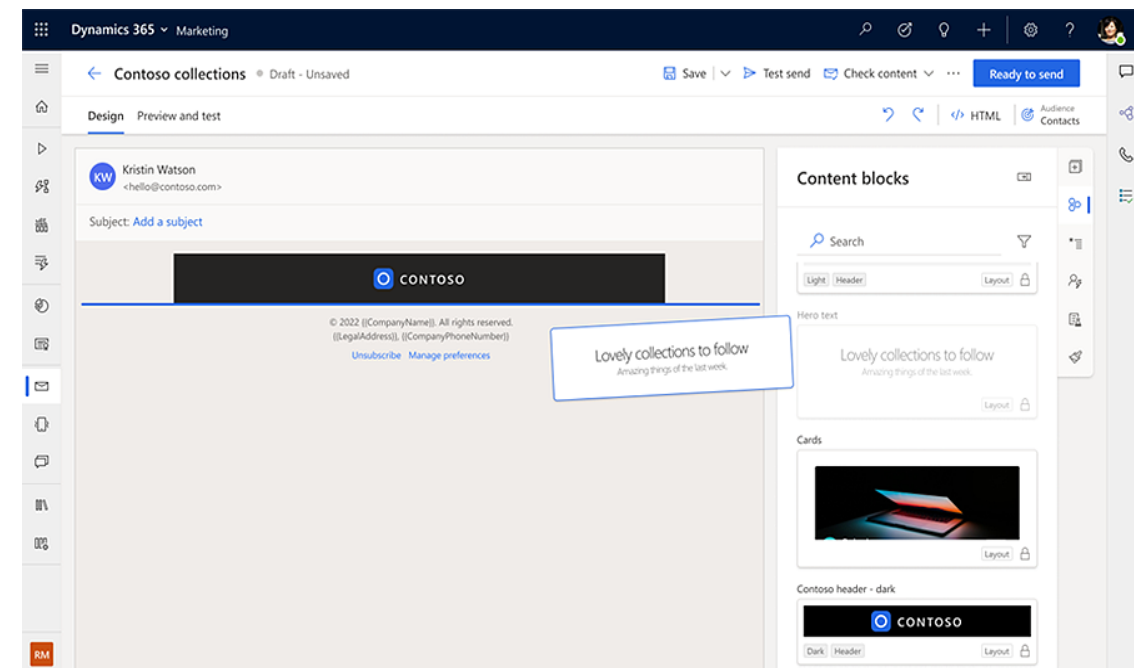
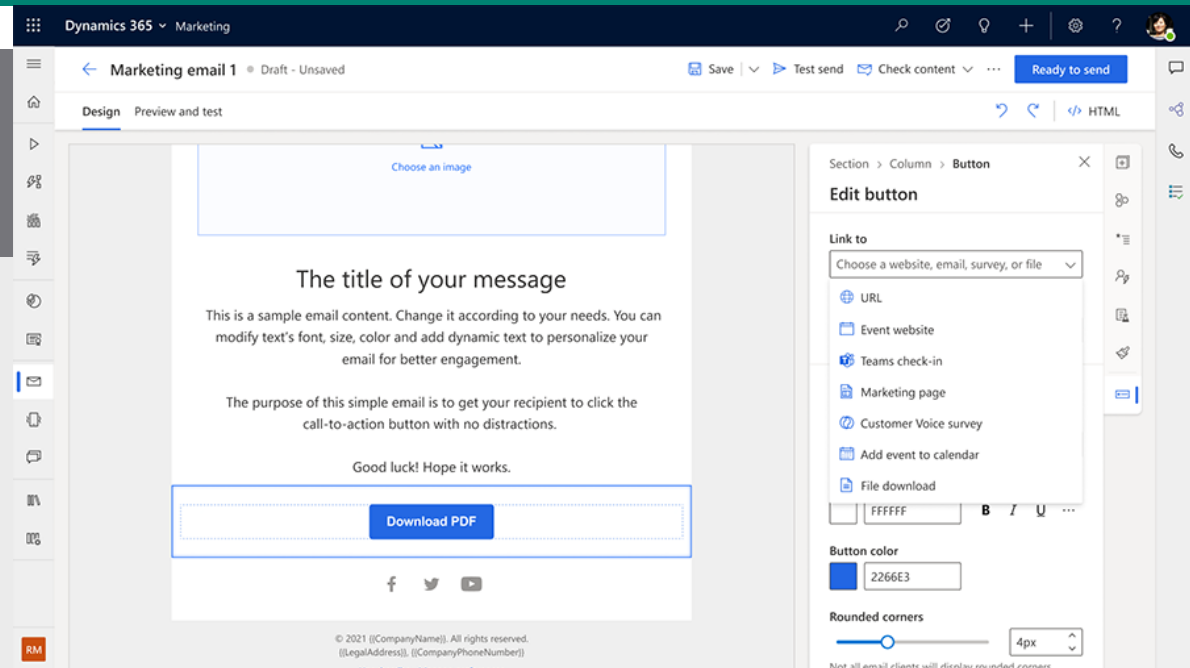
- SMS and Push Notifications as additional channels for engagement
- Now, you can create more than two branches at any given step in the journey, creating more fine-grained personalization and engaging each customer differently based on their unique profile and behavioral signals.
- You can use natural language input to define attribute condition branch
- You can edit a live journey and do major or minor changes. Major changes will be tracked as version of the journey
- You can trigger another journey, or a power automate from your journey using Activate a custom trigger tile
- Channel Optimization can be used to determine by AI which channel is most likely to achieve the journey outcome branch out randomly. This is useful to personalize the journey based on each customer's channel preference.



Key differences in Functionality

- AI-driven image suggestions analyzes the text content of your email and, using AI, suggests the most relevant images from the new asset library
- Dynamic links to emails to directly linking to documents stored in the asset library
- Link to surveys, events, marketing pages, Microsoft Teams events, or calendar items
- You can communicate dates and times in a variety of formats that is readable and consistent with the local language and region in your email.*
- Enable rich Content blocks with layouts to support content reuse, consistency, and efficiency.

*Communicate dates and times in a variety of formats | [Microsoft Learn](#)



Key difference in functionality

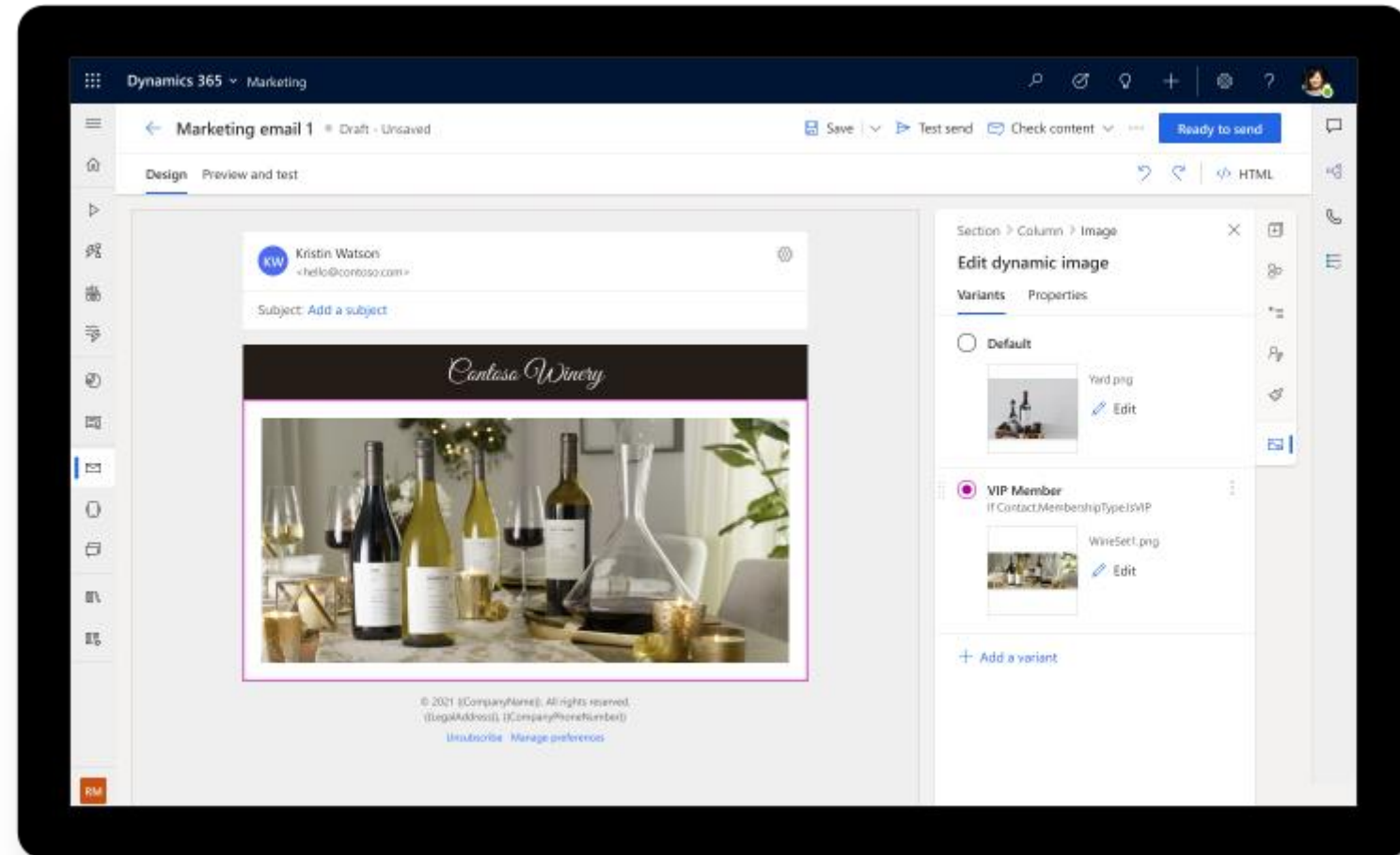
- You can now set the Default values to ensure your message always has appropriate content, even if the data is missing or blank. You can set default value either globally or for the current message
- You can preview your default personalized content or can add your own sample data in the Preview and test view.
- You can use relative and partial dates when defining a condition that uses dates, allowing you to create more flexible personalized content.
- Any user can create new pre-defined dynamic text fragments and share them with their team by adding them to the pre-defined dynamic text list.
- Personalization content can be several relationship "hops" away

The image displays three screenshots of a personalization tool interface:

- Condition Panel:** Shows the configuration for a condition. The data source is 'Contact' with the attribute 'Birthday'. The condition is 'Is' followed by a dropdown menu with options: 'Partial date', 'Any day', 'Any month', and 'Any year'. A label 'Birthday' is entered. Buttons for 'Save' and 'Cancel' are at the bottom.
- Personalization Panel:** Shows the configuration for personalization. The data source is 'Contact' with the attribute 'First Name'. A label 'firstname' is entered. A red box highlights the 'Default value (recommended)' field, which contains 'customer'. Below it, a note states: 'Specify default value to ensure message does not appear blank if the personalization info is missing'. Buttons for 'Save' and 'Cancel' are at the bottom.
- Pre-defined tokens Panel:** A list of pre-defined tokens including 'City', 'Account name', 'Full name', 'Email', 'Salutation', 'Last name', 'Country/Region', and 'First name'. A 'New token' button is at the bottom.
- List Panel:** Shows the configuration for a list. The data source is 'Contact' with the attribute 'Products (Product)'. The 'Attributes' field contains 'Name'. The 'Order by' dropdown is set to 'Created On'. The 'Max amount' is set to '3'. The 'Label' is 'Products'. A dropdown menu for 'Attributes' is open, showing options like 'Decimals Supported', 'defaultuomidname', 'defaultuomscheduleidname', 'Description', 'Entity Image', 'entityimage_timestamp', 'entityimage_url', 'entityimageid', 'Exchange Rate', and 'Hierarchy Path'. Buttons for 'Save' and 'Cancel' are at the bottom.
- Personalization Panel (Detailed):** Shows a detailed view of the personalization configuration. The data source is 'Contact' with a tree structure showing 'Account (Account)', 'Owning User (User)', 'Business Unit (Business Unit)', and 'Parent Business (Business Unit)'. The 'Name' attribute is selected. The 'Display name' field contains 'ParentBUNameofowninguser'. The 'Default value (shown when no data is available)' field is empty.

Key difference in functionality

- Conditional content is an easy way to deliver effective and engaging personalized content by including different images, link or content that match the recipient's interest or their demographic information.
- Author highly personalized messages that automatically include the right content for each customer.
- Create dynamic content with any mix of personalized text, images, and layout without scripting
- Create rules for selecting right content using segment membership, attribute, or triggers.
- Preview content variations in the email designer to see who will receive each variation



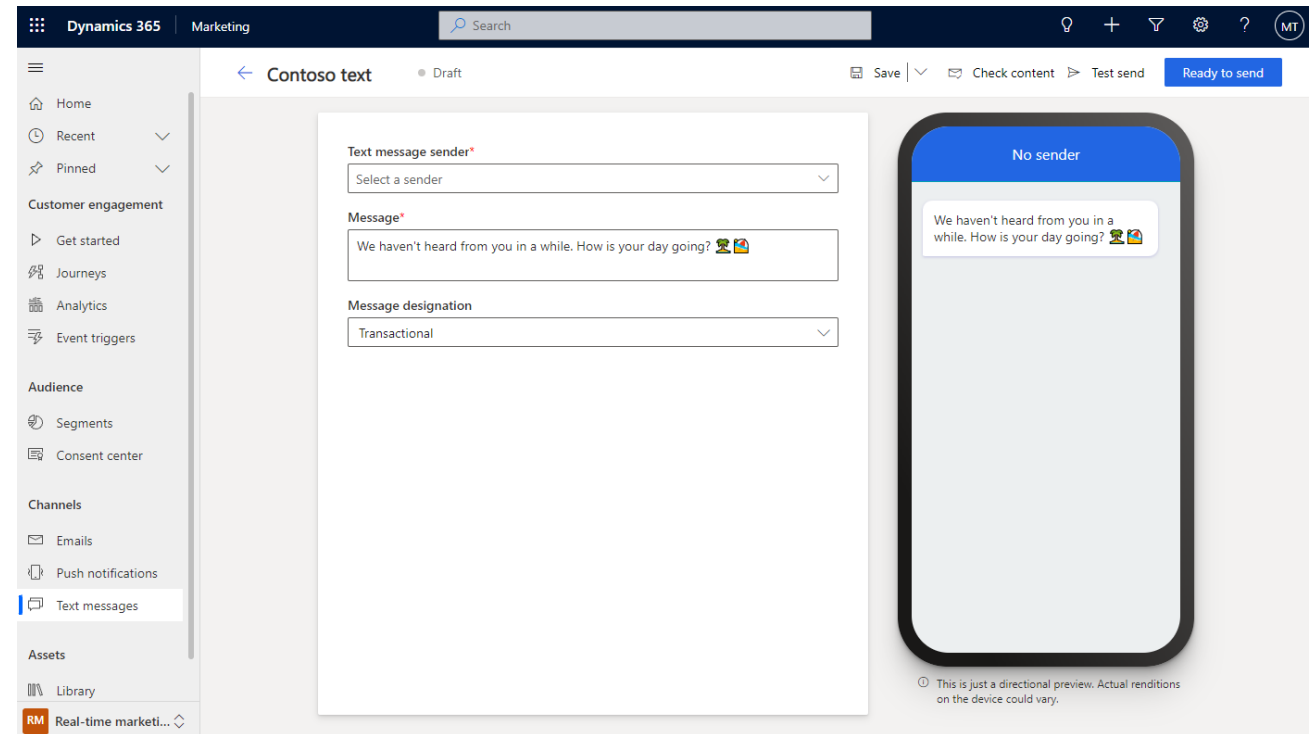
Key Functionality

- Push messages allow you to quickly convey offers, messages, or other information directly to users of your app
- You can send push messages as part of real-time journeys, similar to other outbound messages like SMS
- Push notification supports both iOS and Android applications
- You can personalize your push notification messages using the editor similar to email editor
- You can add Customer Voice survey to a push notification
- You can track push notification messaging matrices from channel insights

The screenshot shows the Dynamics 365 Marketing interface for creating a push notification. The top navigation bar includes the Dynamics 365 logo, the Marketing tab, and various utility icons. A left-hand navigation pane lists categories: Customer engagement (with sub-items: Get started, Journeys, Analytics, Event triggers), Audience (with sub-items: Segments, Consent center), Channels (with sub-items: Emails, Push notifications, Text messages), and Assets (with sub-items: Library, Templates). The main content area is titled 'Enter name' and shows a 'Draft' status. It contains form fields for 'Title' (placeholder: 'Enter title'), 'Subtitle' (placeholder: 'Enter subtitle'), and 'Message' (placeholder: 'Enter message'). Below these is a dropdown for 'On-click behavior' with the selected option 'Open the app'. On the right, there are tabs for 'iOS' and 'Android', and a 'Ready to send' button. A preview of the push notification on a mobile device is shown, displaying the app name and the message text.

Key Functionality

- RTM support two-way text messages natively.
- Currently it supports Azure Communication Services preview, Twilio, or TeleSign providers
- Custom channel to connect to other providers*



*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](#).

Key differences in Functionality

- The real-time marketing consent center allows you to manage consent information given by your customers
- Real-time marketing consent is contact-point based. Customer consent is stored per contact point (email address or phone number), as opposed to being stored per contact record.
- In real-time consents are two types, either a consent to allow communication for commercial content and consent to track the interactions with Marketing communications.
- Customers can use outbound subscription in real-time journeys
- You can only use subscription centers in real-time journeys that target contacts. Journeys that target leads or customer profiles will continue to use the default preference center.
- Customers who already have already gathered consent data in outbound marketing don't need to take any actions in the RTM consent center. RTM journey for contacts will continue to run
- It is possible to customize your preference centers and enforce and track customer consent to meet your business needs across multiple brands and business units in RTM.*

Dynamics 365 | Marketing

Navigation: Show Chart | Delete | Refresh | **Email consent** | **Text message consent** | Load consent

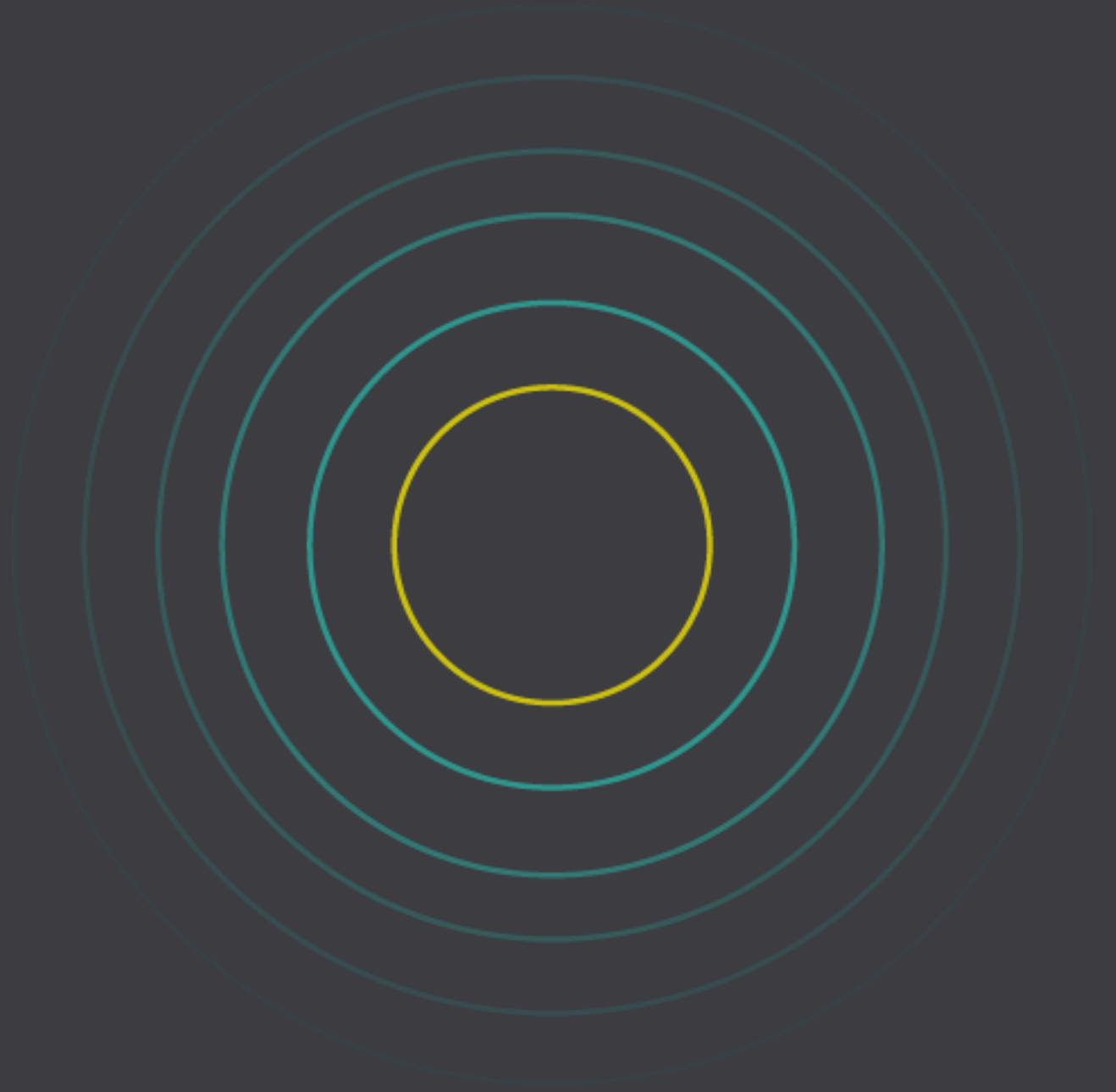
Active contact point consents

Contact point	Type	Consent Type	Consent status	Source	Modified On
[Redacted]	Email	Marketing Co...	Opted In	---	4/9/2021 4:58 ...
[Redacted]	Email	Tracking	Opted Out	---	4/9/2021 4:58 ...
[Redacted]	Text Message	Marketing Co...	Opted In	---	4/9/2021 5:02 ...
[Redacted]	Text Message	Tracking	Opted In	---	4/9/2021 5:02 ...
[Redacted]	Text Message	Tracking	Opted In	Internal	4/16/2021 4:0...
[Redacted]	Text Message	Marketing Co...	Opted In	Internal	4/16/2021 4:0...
[Redacted]	Text Message	Marketing Co...	Opted In	---	4/9/2021 4:38 ...
[Redacted]	Text Message	Tracking	Opted In	---	4/9/2021 4:38 ...
[Redacted]	Text Message	Marketing Co...	Opted In	---	4/15/2021 3:3...
[Redacted]	Text Message	Tracking	Opted Out	---	4/15/2021 3:3...
[Redacted]	Text Message	Marketing Co...	Opted In	---	4/9/2021 5:09 ...
[Redacted]	Text Message	Tracking	Opted In	---	4/9/2021 5:09 ...

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* [Capture consent and preferences to match your business need will be available in Feb2023.](#)

Chapter 2: Explore



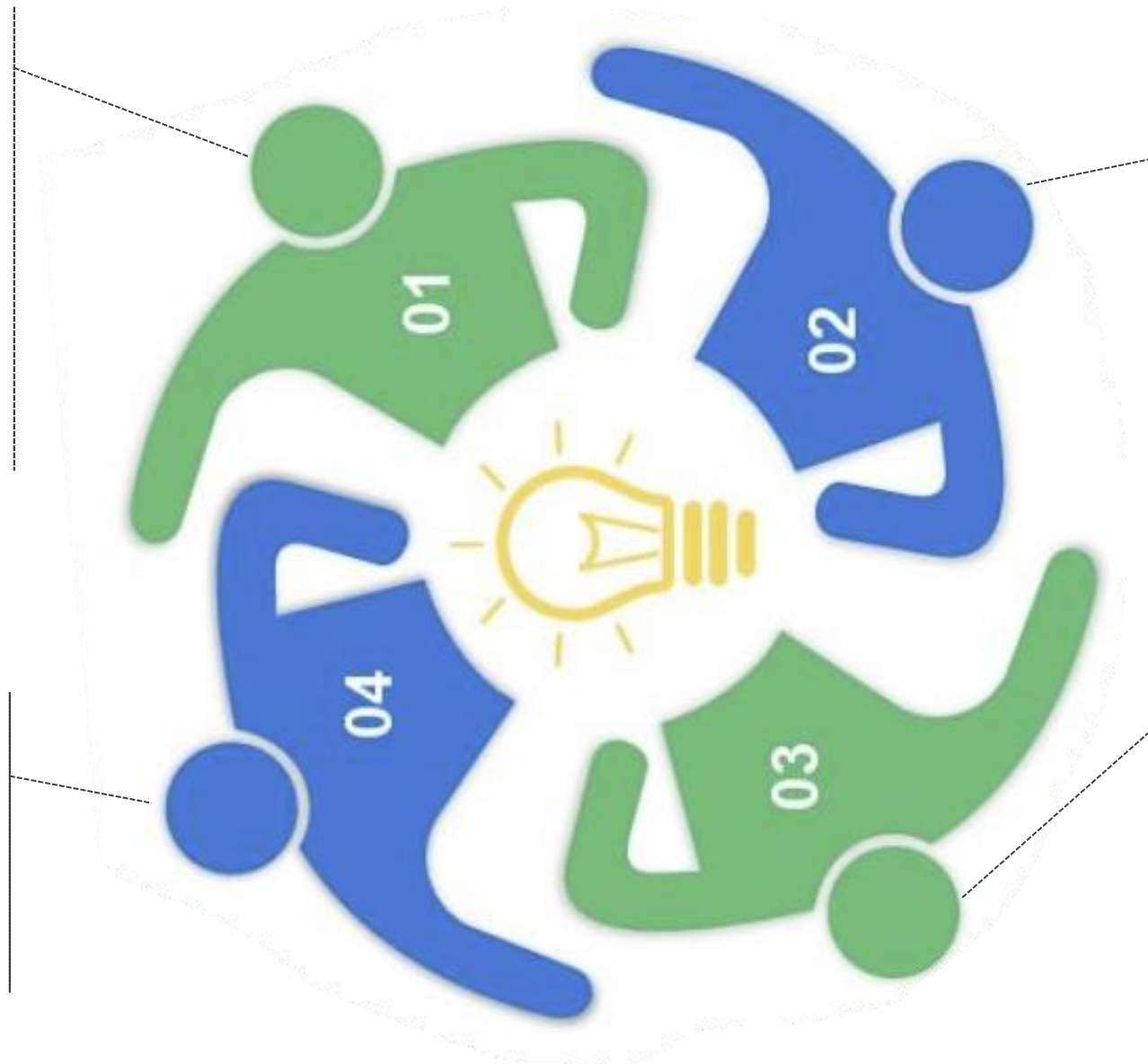
Consider the evolution of your campaigns

- Early in the planning stage, it is recommended to think about how Real-Time Marketing will impact the traditional way you reach your customers
- Beyond the features, consider the benefits of reaching out customers in a more 1 to 1 model than in batch or bulk as this can impact what will be required and what needs configuring
- For example, in OBM a dynamic segment to identify contacts that have created new subscriptions in the last X days could be the start of a journey but, with RTM what is possible is for the start to be the subscription event(from Form submission event) itself not the result of a query, making the interaction more timely and personal.
- As campaigns transition to RTM, consider which segment-based communications are better served as triggered based communications.

It is recommended that transitioning from outbound to real-time marketing is done through a phased transition to RTM. This allows the execution of a pilot of the Real-time Marketing features and gather feedback from end users without interrupting the ongoing outbound marketing journeys. The result will be more fine-tuned experience as users' transition.

Create a feedback gathering process and encourage users to provide feedback.

Set up a cadence to capture user insights and discuss recent improvements.



Identify the journeys that has an equivalent or better way in Real-time Marketing.

Finalize Real-time Marketing implementation scope and implement into Production environment.

Train Marketing Team and have pilot team to support them in the transitioning period. They might require assistance on certain occasions as the 2 features have distinct ways of handling certain functions.

User adoption depends on successful change management and end-user training. Planning the cut-over process and supporting end users throughout the go-live period and initial adoption phase will increase the realized value of your implementation drastically.

Provide detailed training materials based on your training on real-life marketing scenarios for your organization	Consider the background of the end users, who might be used to “megaphone” type campaigns and will need to learn about trigger-based communications	Make IT helpdesk aware and upskill the team to resolve Level 1 tickets	Monitor application usage and identify areas which are primarily used. Highlight core features that are under-utilised and explain the potential value	Assign champion users who have more hands-on experience with the RTM to support other users to start using the RTM	Introduce feedback gathering channels and continue building your backlog
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Map desired functionality to new capabilities

- Review your existing OBM journeys to document functionality which is critical to your marketing activities.
- Understand and document configuration which was done in the OBM and begin to visualize how it translates to RTM.
- Review enhancement requests, technician feedback and suggestions – now is a great time to make a change or address long-standing pain points!
- Below is the sample sheet you can use to plan your transition.

Area	OBM	RTM
Journeys	Segment based journey	Segment and Trigger based journey
	Scenario 1 – Contoso Banking gathers data through a form for credit card launch event and then starting a journey based on Dynamics segment of contacts who populated the form.	Transition Scenario 1 – Trigger a journey on form submission event to engage contacts who just populated the details to do further marketing.
	Scenario 2 – Contoso Insurance runs Claim Journey for the customers who submitted a claim in last 30 days will be considered as Leads for this Campaign. Leads will receive communications to promote Privilege Offer or Product recommendation via Emails.	Transition Scenario 2 – Contoso Insurance doesn't have to wait for 30 days to collect all the data. They can trigger a journey on Claim Submit event to send communication to promote Privilege Offer or Product recommendations.
	Scenario 3 – Contoso Inc is a relief management company, creating a new segments and journeys for every disaster relief deployment to direct individuals to a registration process for the relief.	Transition Scenario 3 – Contoso Inc can create a single journey in which the triggering event of confirmation for relief to a contact starts communications

Segments

Segments let you create groups of contacts based on certain characteristics such as demographic information, purchasing behavior or interactions with digital channels. You can use segments to group of your customers and target those for your marketing activities. As segments define the characteristics of the audience, you can differentiate your communication language or marketing channels based on targeted segment.

How it works in OBM:

OBM Segments allows to build dynamic or static segments which can be accessed by navigating to OBM → Customers → Segments inside the D365 Marketing app.

OBM supports query, behavior and segment blocks to query data within Dynamics and build dynamic segments.

How it works in RTM:

Segments created in OBM can still be used.

Enhanced segments* in RTM is in preview and only allows to build dynamic segments which can be accessed by navigating to RTM → Audience → Segments inside the D365 Marketing app. RTM segment supports only Profile block query to build dynamic segments.

Can also consume Customer Insights segments within Journeys

Migration Path:

1. As Real-time marketing uses segments directly from outbound marketing, there is no immediate need to re-build the OBM segment to RTM. However, we recommend moving OBM Segment to RTM for journeys you are planning to transition to RTM for transition completeness.

Important Note

1. The OBM Segment, where we do not have feature parity, waits for that feature parity to come to RTM and then plans to re-build into RTM.
2. Please note that you cannot use OBM Behavior Segments in the RTM journey, as RTM behavior(interactions) are stored in different storage.

* Please refer the [What's new page](#) to look for GA date for RTM Segments

Triggers

Triggers control the flow of trigger-based journeys. They represent customer actions such as a whitepaper download, a form submitted, or a Wi-Fi sign-up. Triggers can also represent significant business events, such as a purchase that has shipped or completion of an enrollment process. Triggers can be used to start, continue, or stop a journey.

How it works in OBM:

N/A

How it works in RTM:

Real-time marketing offers three types of triggers in the triggers catalog: custom triggers, interaction triggers, and business triggers. You can create custom and business trigger by navigating to Marketing → RTM → Engagement → Triggers inside the D365 Marketing app
Please follow [this](#) link to move custom triggers between environments.

Migration Path:

N/A

Journey Automation

Marketing automation allows marketers to optimize repetitive marketing tasks. It provides the ability to be relevant in their communications by providing the ability to personalize, messages, and channels. Marketing platforms typically offer a marketing canvas to be used as a designer for the end to end customer experience. Designer canvas include branches to apply different marketing strategies based on customer interactions.

How it works in OBM:

Customer Journeys feature is can be broken down to 5 areas;

Target: Segment or Record updated

Content: Marketing communication via email only

Actions: Run workflows, create leads or activities

Flow Control: Wait for / Wait Until – This tile can be used both as a wait timer and also a date timer

If/Else: Splits the journey into branches based on customer interaction. (Important to note that this feature is limited to insights data and cannot use advanced find filtering)

Splitter: Can be used to branch out randomly. This is useful for A/B testing at the journey level or to spare a control group.

How it works in RTM:

Journeys is the equivalent of this feature. Journey tiles can be broken down to 8 areas;

Target: Segment / Event Triggers

Content: Marketing communication via email, text, push notification and custom channel*

Actions: Run power automate by activating custom trigger

Flow Control: Wait for / Wait until: This tile can be used both as a wait timer and a date timer

If/Else: Splits the journey into branches based on customer interaction.

Branch: Splits the journey into multiple branches based on customer interactions, triggers, segments and attributes filtering.

Splitter: Can be used to branch out randomly. This is useful for A/B testing at the journey level or to spare a control group.

Channel Optimization: Can be used to determine by AI which channel is most likely to achieve the journey outcome branch out randomly. This is useful to personalize the journey based on each customer's channel preference.

Journey Automation

Migration Path:

Preferred approach will be to let Campaigns complete in OBM and over time transition to RTM. If migration is needed, Campaign Automation records need to be recreated manually.

1. Consider transition to trigger-based journeys
2. Create journeys with the same campaign automation name
3. Build the journey while taking into account differences in functionality and design based on comparison slide
4. Check and fix all warnings that show up in this stage
5. Run a test on the newly created Customer Journey and make sure you test every branch of the journey
6. Go-live

Important: Be mindful that once the journey's start date and time is reached, the journey will start running for every customer in the target audience.

Emails

Email is one of the most popular channels being used in today’s marketing communications. Marketing platforms provide marketers with tools to design the email content. Typically, email designers will have one drag & drop type editor and also allow custom coding via HTML.

Email communications usually aim to start an interaction with the customer by either inviting the customer to visit a webpage or fill out a certain form to register their interest. So, it’s a common practice to include links to other marketing components in a marketing email.

<p><u>How it works in OBM:</u></p> <p>The designer features a drag-and-drop interface for building and working with the design, plus an optional HTML editor for working directly with code and a preview tool that can show how your design will look on various form factors and orientations. Step by step on how to create emails in OOB.</p> <p>In OOB to create or review emails go to OBM → Marketing Execution → Marketing Emails → New Email.</p> <p>Personalization limited to use of entities one-hop away from contact</p>	<p><u>How it works in RTM:</u></p> <p>In addition to the standard email editor features, the RTM email editor includes unique personalization capabilities and AI-driven image suggestions.</p> <p>Please see here the powerful email personalization available in RTM.</p> <p>In RTM to create or review emails go to RTM → Channels → Emails → New Email.</p> <p>Can include personalization using entities several hops away from contact or lead.</p>
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Migration Path:
<p>Emails created in outbound marketing need to be recreated in the real-time marketing email designer to be used in real-time marketing.</p> <ol style="list-style-type: none">1. Select the email template from OBM2. Design your email as per the original email content in RTM3. Publish the email by clicking Ready to Send button

Bypassing Email Deduplication

- Since OBM was designed for communications in bulk, the default behavior includes a deduplication of outgoing email messages to each unique email address. This can be disabled as a part of the marketing settings (<https://learn.microsoft.com/en-us/dynamics365/marketing/mkt-settings-default-marketing#the-bypass-email-deduplication-tab>)
- Real-Time Marketing allows reaching out to customers in the moments that matter rather than waiting for the customer to become part of a target group. This change in thought process leads to a focus of the communications based on the triggering event and through multiple channels, therefore:
 - Deduplication is no longer required and therefore has not been implemented
 - It now supports scenarios that allow customers to go through the journey multiple times.
- In the planning stage of the transition to RTM handling of the above difference should be accounted for.

Content Blocks

Content blocks are premade pieces of content that you can insert into emails. They can contain text, images, links, buttons, and more – anything that can be used as content in an email. They also can include formatting and layout. When inserted, all of the content (including the layout, if present) contained within the content block becomes part of the email.

How it works in OBM:

In OBM we can have Element and Section content blocks. Element content blocks only contains elements and Section content blocks retain sections and its layout.

Content blocks can be created directly from the email designer (select the Content block context menu item) or from the Content Block editor (Navigate to the Content blocks menu item in the left navigation menu)

[Here](#) you can read more about this feature.

How it works in RTM:

A more robust Personalization engine is available in RTM. Allows you to include Compliance and Preference Centre information in an easy way. Then you just drag and drop content blocks into the email canvas area.

In RTM to create or review content blocks go to OBM → Assets → Content blocks → New Block.

Migration Path:

Content Blocks created in outbound marketing need to be recreated in the real-time marketing email designer to be used in real-time marketing.

- 1. Select the content block from OBM
- 2. Design your new content block as per the original in RTM
- 3. Publish the content block by clicking on Ready to Send button

Build Your Asset Library

Assets are an important part of most marketing-page and marketing-email designs. The asset you use must be available publicly on the internet so your emails and pages can access and display them. Keeping images, videos, documents inside your marketing tool's Asset library allows you to host them publicly and provides the ability to use them within the designer canvas.

How it works in OBM:

OBM include an image and videos library feature which can be accessed by navigating to OBM → Marketing Content inside the D365 Marketing app.

How it works in RTM:

RTM provides the same functionality by providing an asset library to keep images, videos and documents. The assets can be uploaded by navigating to Marketing > RTM > Assets > Library inside the D365 Marketing app.

RTM has advanced Asset Library Add-on which user can install by following steps mentioned [here](#).

Migration Path:

1. Upload all your images from OBM to RTM directly within the application from the OBM -> Images -> Import all files to RTM(Ribbon button)
2. Download all your videos library in a repository
3. Upload all your videos (Marketing > RTM > Assets > Library)*
4. In RTM now you can upload the documents as well.

* You can upload videos from OBM to RTM using Configuration Migration Tool

Text Messages

Text messages is one of the most popular channels to quickly communicate with mobile users. Marketing platforms provide marketers with tools to design the text message content. Typically, text message designers will have editor which allows text, emoji and personalize the content. Text message communications usually aim to send fast, transactional communications and marketing messages. Text message allow marketers to act on when customer respond back to text message marketer have sent only for the predefined keywords.

How it works in OBM:

OBM required custom channel to configured to send out text messages. You can find step by step instruction mentioned [here](#) to create custom channel in RTM.

How it works in RTM:

Outbound text messages is native channel in RTM. RTM natively supports Azure Communication Services preview, Twilio, or TeleSign SMS providers. Customer can setup custom channel to configure third party SMS provider*. SMS provider can be configured by navigating to Marketing →Settings →Customer engagement →SMS providers inside the D365 Marketing app. Text messages can be configured by navigating to Marketing →RTM →Channels →Text messages inside the D365 Marketing app.

Migration Path:

Text message records are not migrated as much they are recreated in the RTM.

1. Select the text message
2. Design your text message as per the original text content
3. Once ready to go live by clicking on "Ready to send" button on the top
4. Please note OBM Custom Channel Activities records against customer are also not able to migrate to RTM

* Custom channel will be in generally available in Real-time marketing within the [2022 release wave 2, October 1, 2022 – March 31, 2023](#).

Push Notifications

Push notification is to quickly convey offers, messages, or other information directly to users of your app. Marketing platforms provide marketers with tools to design the push notification content. In the push notification message editor, you can enter a title, a subtitle, a message, and preview how your message will appear in iOS and Android. Push notification communications usually aim to send fast, transactional communications and marketing messages.

<u>How it works in OBM:</u> N/A	<u>How it works in RTM:</u> Push notification is a new channel in RTM to send notification messages to customers who have installed your mobile app*. Mobile app configuration for push notification can be configured by navigating to Marketing →Settings →Customer engagement →Push notifications inside the D365 Marketing app Push notification can be configured by navigating to Marketing →RTM →Channels →Push notifications inside the D365 Marketing app.
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Migration Path:
N/A

* Push notification currently doesn't support the portal app notification.

Subscription and Consent Lists

Subscription list lets you create groups of contacts based on their preference what type of bulk email they wanted to receive. Each subscription list exists as a static marketing list in Dynamics 365, while **do not bulk email** is an explicit attribute of the contact entity. That means that **do not bulk email** overrules subscription list memberships, but it also means that list memberships will be reactivated if a contact later clears **do not bulk email**.

<p><u>How it works in OBM:</u></p> <p>Step by step instruction on how to create subscription list and maintain consent for bulk email in OBM.</p>	<p><u>How it works in RTM:</u></p> <p>RTM uses OBM subscription centers to maintain subscription list. Step by step instruction on how to use OBM subscription list in RTM journey.</p> <p>RTM consent center allows you to manage consent given by your customers for email and text messages. Step by step instruction on how to setup consent center in RTM.</p>
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Migration Path:

1. If you wish to run a real-time customer journey for contacts for which you have already gathered consent data in outbound marketing, you don't need to take any actions in the consent center (you are not required to select the Load consent button or create new consent records) under one condition. Consent for sending commercial emails should be stored in the Allow bulk email field of a contact record. Even with the consent center empty, the app will check the Allow bulk email field of each contact record and send a commercial email based on this data.
2. In RTM if your sending commercial text messages then it requires that a mobile number opted in in before it can receive a message. Follow [this](#) link on how to setup text message consent.
3. Once enhanced consent and preference capture across multiple brands and businesses feature is available in [Feb 2023](#) consider that to migrate all OBM subscription list to RTM.

Unsubscribed Contact Lists

Providing a clear path of how a recipient can opt out of being communicated in the future and respecting this decision for future marketing communications is considered as a best practice, enforced as regulations in many countries.

For this purpose, marketing tools allow users to record unsubscribed contacts and put certain measures to not communicate for marketing activities in future campaigns.

How it works in OBM:

[Step by step](#) instruction on how to add unsubscribe link in your email for recipient to opt out.

How it works in RTM:

In RTM email you can add the unsubscribe link by using a new dynamics link personalization feature. In the link box you have to select Preference center under the compliance section.

Refer [this](#) link for compliance setting in RTM.

Migration Path:

1. There isn't anything you have to do to maintain unsubscribe list separately in both OBM and RTM. However, refer below blogs to understand how OBM and RTM work together.
2. [Double Opt-In in Real-Time Marketing - Microsoft Dynamics Blog](#)
3. [Using Outbound Subscription Centres In Real-time Marketing \(meganvwalker.com\)](#)
4. [Managing Text Message Subscriptions In D365 Marketing \(meganvwalker.com\)](#)

Event Management

Event management features allows marketers to execute marketing events, connecting event planning with landing page and registration forms for invitees. Attendance tracking and webinar provider integration is also available. Details can be found in the [documentation](#).

Communication engines can be used to communicate to an event’s target and registered audience. Event Management was built with OBM but can still use RTM features to engage with audience and new features in the roadmap will extend it using RTM Forms in Event Planner and Power Pages to improve the registration management.

How it works in OBM:

Event data (date, speakers, agenda, etc.) are defined and the event goes live. If using the Event Portal, this makes registration open.

Event organizers will create an email to send to the target audience. Email content will include links to the registration page

Customer Journey is created using Email Tile, ensuring to set the Event details as Email Element to track registration.

Journey continues based on communication plan for the event

How it works today:

Overall process is the same as in OBM, with event data and portal setup first, then an email communication plan setup in customer journeys.

With RTM, the registration process would be based on the OOB triggers provided which allow branching within the journey.

Additionally, with RTM, it is easier to split out the post-registration journeys and use the OOB trigger. This allows to bring in the context of the event into the journey, allowing communications to be timed around event dates, a much-requested feature of OBM.

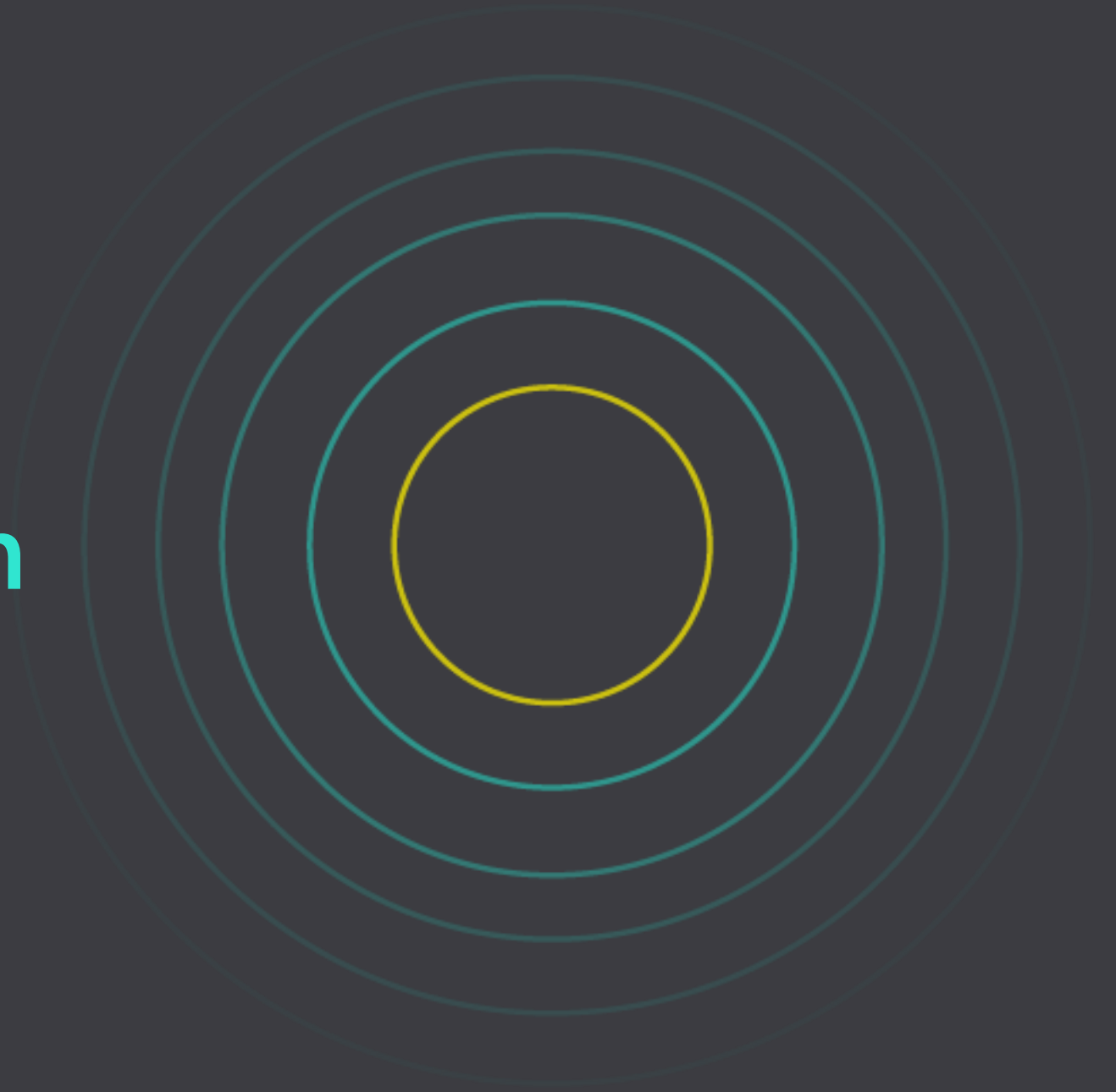
New Features included in the Roadmap:

- New RTM Forms available in Event planner (instead of using event registration form)
- Power Pages with design studio (instead of Portals website, customizable with angular development)

Gaps/Difference

1. Event creation and management process does not change with transition to RTM
2. Email content and customer journeys do need to be recreated
3. Recommendation is to not transition any in-flight events but any new events should leverage RTM and the real-time triggered communications around registration

Chapter 3: Transition



Let's begin!

- Determine the right transition approach for your organization
- Deployments of different sizes and complexity may take different approaches to transitioning their campaigns.
- THINK REAL TIME – Transition does not imply doing things the same way. Keep in mind what can be improved in the processes when targeting moments that matter over batch communications.
- Our recommendation to go with **Incremental Transition** without interrupting existing outbound marketing campaigns.

Incremental Transition – Targeted OBM Campaigns

Benefits

- Easier to get started
- End-user impact is minimized as transition is done in waves
- Areas impacted by issues or gaps can be avoided
- Team learns from experience
- Existing campaigns can run undisturbed by the transition

Drawbacks

- Two marketing features to support and maintain
- New campaigns need the extra decision of which module to use

Full Transition – Recreate all OBM Campaigns

Benefits

- Single Marketing application to support and maintain
- All users get new features and capabilities provided by the latest application.

Drawbacks

- “Big bang” approach is riskier, all issues and gaps need to be considered
- All end users are impacted (training, change management)
- Existing assets (journeys, emails, etc.) need to be rebuilt in RTM

Step 1 Define Transition Scope	Step 2 Configure Settings	Step 3 Migrate Marketing Artifacts	Step 4 Migrate Segmentation	Step 5 Create Triggers and Journey	Step 7 Custom Report Analytics
What campaigns are needed? <ul style="list-style-type: none"> Identify new or existing campaign that would add value to be implemented in RTM Try to avoid having a lift & shift approach Use this as an opportunity to enhance campaigns Identify what channels are needed Identify the campaigns which can't be move to RTM due to feature parity and discuss with the business to strategize running the campaign new way 	Setup Real-time Marketing Configurations <ul style="list-style-type: none"> Feature Switch SMS provider SMS Keywords Push notification Other Communication channels Brand Profiles Compliance 	Migrate visual elements <ul style="list-style-type: none"> Images Videos Emails and Templates Content Blocks Text messages 	Build your segmentation logic <ul style="list-style-type: none"> Identify OBM Segment to move it to RTM Segments for enhance capability to create complex segments 	Build your custom triggers <ul style="list-style-type: none"> Identify scenario where you can create your own custom trigger or use OOTB trigger to create trigger-based journey Build your journey <ul style="list-style-type: none"> Build the RTM journeys which you have identified to move it from OBM Build new journeys if any 	Setup and build <ul style="list-style-type: none"> Identify existing custom report require re-build Follow this link to setup RTM custom reporting infrastructure Rebuild and enhance the custom report with more detailed insights
Business Decision	Manual	Automated*	Manual	Manual	Manual

* Simpler entities like images, videos could be imported using the native configuration migration tool.

Start by testing the transition process and new user interface in a Sandbox Environment

- Finalize Re-building the existing OBM journey to RTM journey
- Run the Journey
- **Review and Follow Up**
 - Collect feedback
 - Improve & expand

Step #4: Run the Campaign in PROD

Step #1: Install RTM to existing Dev environment*

- Configure RTM specific settings
- Identify OBM campaigns to move to RTM
- Identify campaign enhancements that you can implement by leveraging RTM features
- Quick check & identify gaps
- Build a list of process changes or training required

Step #2: Create a journey in RTM

- Deploy configurations and customizations by following your ALM process
- Create new components
- Create new Journey
- Run through test cases
- Quick check & identify gaps
- Gather some initial experiences

Step #3: Install RTM to Prod environment*

- Implement necessary changes identified in Step #1
- Include new features which you have identified in Step#1 to enhance your journey
- Run through Test Cases
- Collect feedback & make it better
- Conduct the training for list you have built in step #1

* Installing RTM to your existing environment may not required if it is already enabled.

Configurations Required Before You Start



Feature Switches

- The feature switches allows you to enable latest RTM features like CJO designer, new content block designer, etc.
- Refer to [Feature Switches settings](#)



Audience configuration

- Define your audience data source. RTM allows you to market to Contact, Lead and Customer Profile entities.
- Refer to [Audience configuration setting](#) for more information



Compliance

- We recommend that you configure compliance settings to ensuring your business processes conform with privacy laws such as the GDPR. . This will let your customers know that you take their privacy seriously, and it might also be required in some jurisdictions. Navigate to RTM → Audience → Consent Center (Under Marketing Settings area)
- Refer to [Compliance setting page](#) for more information



Text message setup

- Outbound text messages required to setup phone number generated by either in Azure communication service(US only) or Twilio or TeleSign.
- Refer to [Outbound text messages](#) for more information
- You can follow the steps mentioned [here](#) to configure SMS Keywords to track the customer's response to your text messages.



Push notification setup

- Push notification configuration requires to configure mapping from D365 Marketing customers to mobile application users. This ensures that the correct person receives the expected mobile push notification.
- Refer to [Push notification setup](#) for more information how to setup.

Raising and tracking issues in production

When it's time to find answers to your Microsoft Dynamics 365 questions, there are a variety of self-support and assisted support options to provide the help you need.

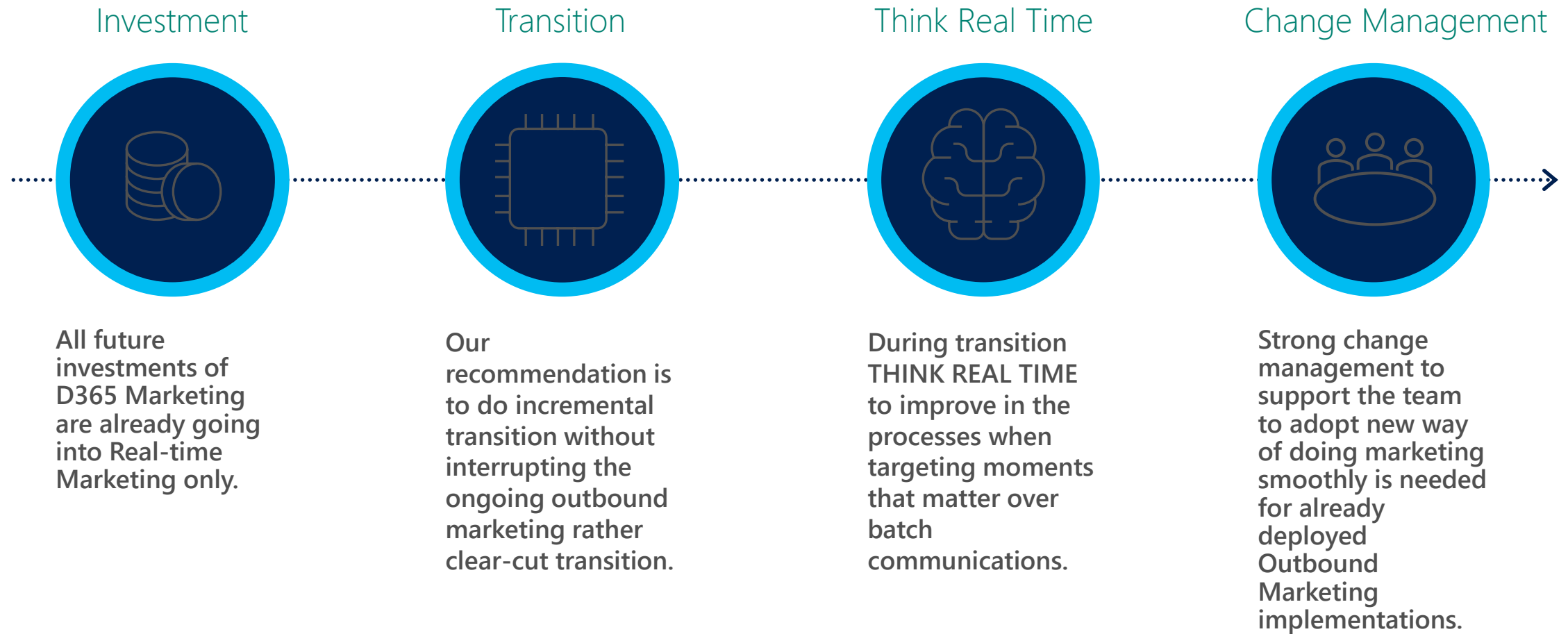
The Troubleshooting Guide helps you locate the most relevant information for the problems you're trying to solve. [TSG](#)

Can't find a solution yourself? Send a question to the Community and receive answers from other customers, partners, MVP's, and Microsoft employees.

<https://community.dynamics.com/>

Raise support requests for expedited live site support. Your support ticket will be appropriately tracked and routed to a team of experts that will help you resolve your problems. [CRM Support](#)

Summary



Thank you





This playbook is provided “as-is.” Information and views expressed in this playbook, including URL and other Internet Web site references, may change without notice. You bear the risk of using it.

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