

CRM connect

Be a Marketing Master with
the 2025 Enhancements



THURSDAY 15th MAY 2025



Can you hear me?



Is everything clear?



~ 45 mins



Q & A



Zak



What's new in 2025?

- Outbound Marketing will be deprecated on 30th June 2025
- Personalise emails and make journey decisions based on website interactions
- Streamline form filling and event registration with form prefill
- Create an Event portal in Power Pages or on your own website (June 2025)
- Save your own Journey templates
- Edit emails and personalisation links that are used in Live Journeys

Here's some features you may have missed...





- Copilot can draft your emails based on tone e.g. Adventurous
- Copilot can also draft your Journeys and Segments (kind of...)
- One click unsubscribe preference centres
- Email heatmaps in real-time marketing
- Lead and opportunity creation directly from Journeys
- Form capture directly from your website using JavaScript
- Quiet times based on locations and time zones



Web Tracking

Web tracking – What can you do with it?

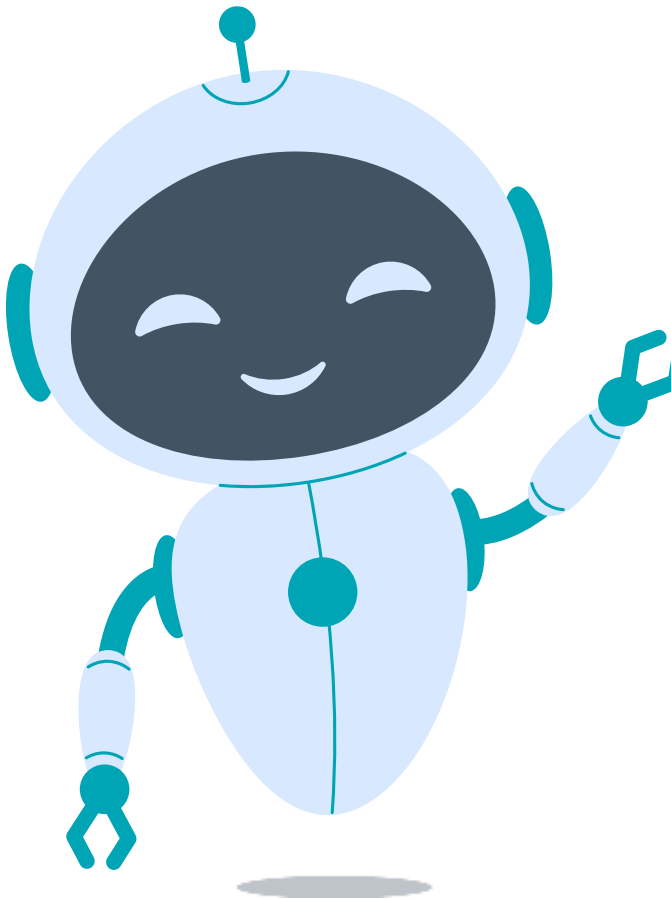
Standard Triggers Overview* ▾

- ☐ Name ↑ ▾
- ☐  Marketing Website Clicked
- ☐  Marketing Website Clicked (outbound marketing)
- ☐  Marketing Website Visited
- ☐  Marketing Website Visited (outbound marketing)



- There are 2 standard triggers:
- Website visits (captured every time a known customer visits a page on your website)
- Website clicks (captured every time a known customer selects a link such as a banner on your website)
- You can now see information on the Insights tab on a Contact / Lead

Web tracking with Google Tag Manager



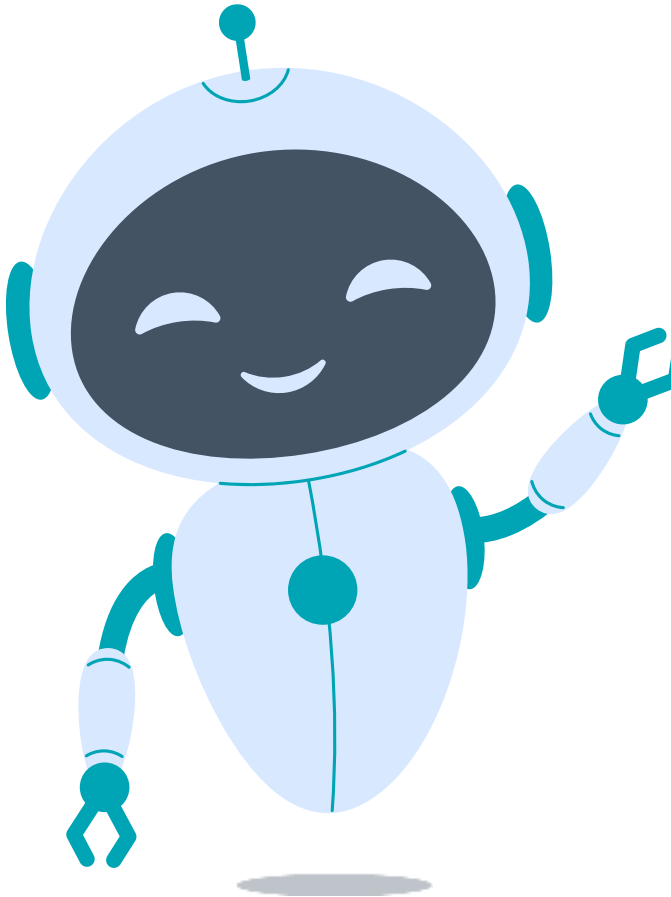
- You can deploy the script in GTM without directly modifying your websites code.

```
Code

<script>
(function (a, t, i) { var e = "MSCI"; var s = "Analytics"; var o = e + "queue"; a[o] = a[o] || []; var r = a[e] || fu
src: "https://cxppgbr1rdirect01sa02cdn.blob.core.windows.net/webtracking/WebTracking/WebTracking.bundle.js",
name: "MSCI",
cfg: {
  ingestionKey: " ",
  endpointUrl: "https://mobile.events.data.microsoft.com/OneCollector/1.0/",
  autoCapture: {
    view: true,
    click: true
  },
  orgInfo: {
    orgId: " ",
    orgTenantId: " ",
    orgGeo: "GBR"
  }
});
</script>
```

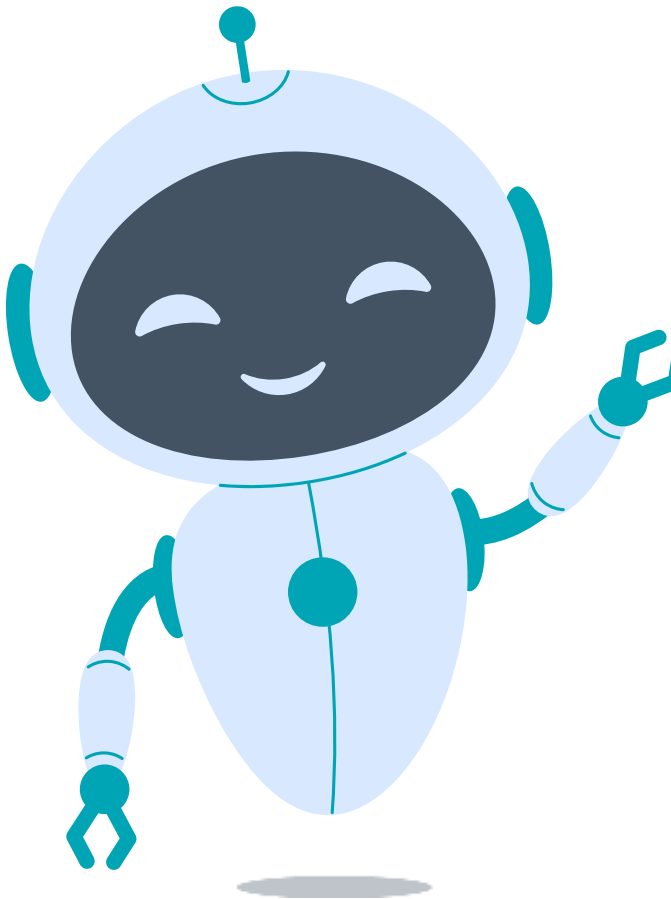
[More instructions](#)  Copy

Web tracking (Preview!)



- No way to use the website visits or clicks to build a segment
- No way to use the website visits or clicks for lead scoring
- No way to see the traffic anywhere in Customer Insights – Journeys so you won't know who's visited a specific page any other way than the trigger firing
- You can now see the website visits or clicks on the timeline for a contact/lead as of 6th May 2025!

Web tracking (Preview!)



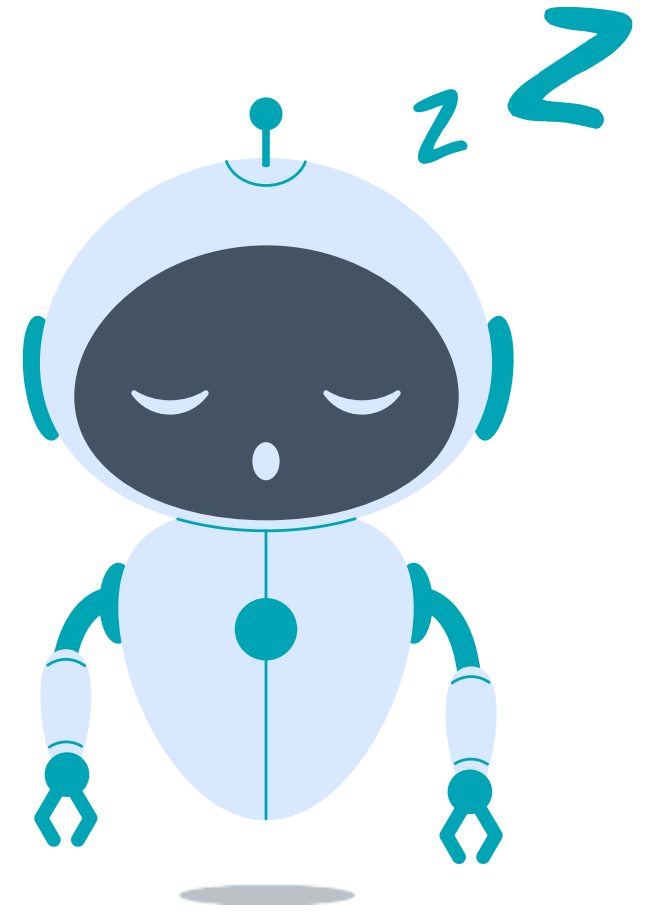
- The JavaScript code you generate uses cookies to record each page that an individual browser requests from your website.
- The script provided by Microsoft will attempt to set a cookie for visitors who have opted out. You need to modify Microsoft's script so that it works with your site's opt-out mechanism.
- It is your organisation's responsibility to be aware of, and conform to, relevant laws regarding the consent to set cookies.



What else is new?

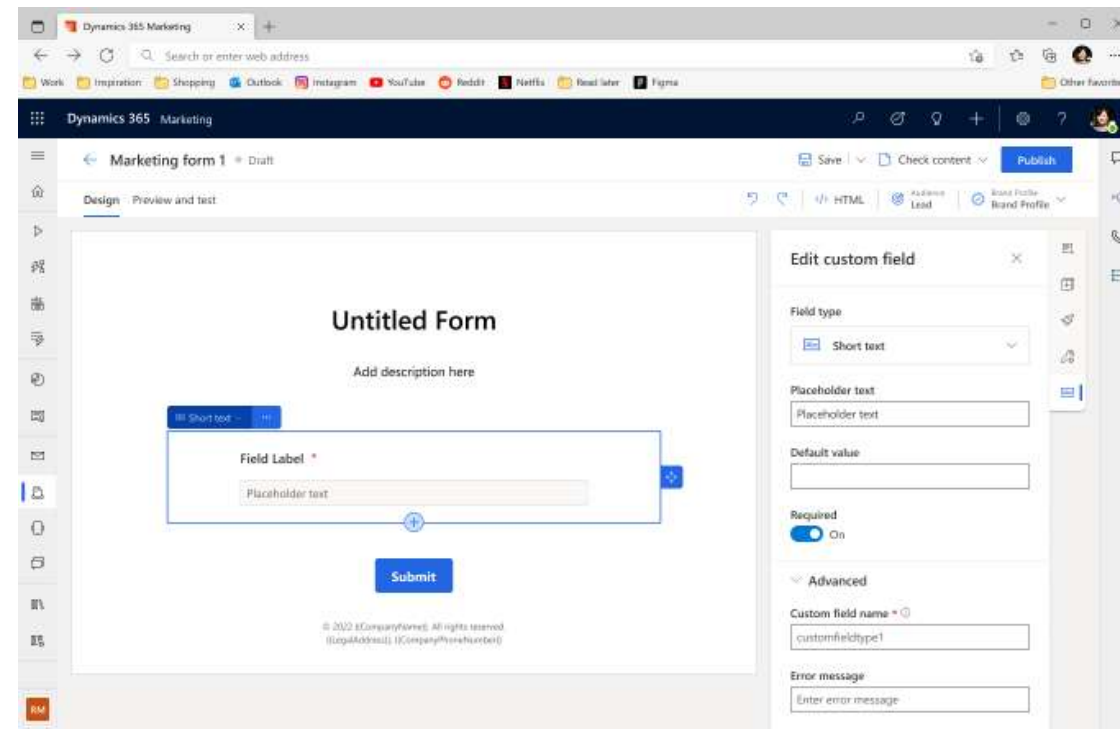
Respect quiet times based on location and time zones

- Set times, days, and dates when customers shouldn't be contacted
- Define the customer's region and time zone
- Customise quiet times for a particular journey. Interactions will then be queued in accordance with the times you've set.
- E.g. If you work across multiple countries, set up different rules for e.g. UK/USA/France. To ensure the customer receives the information during the daytime – not at 3am in the morning!



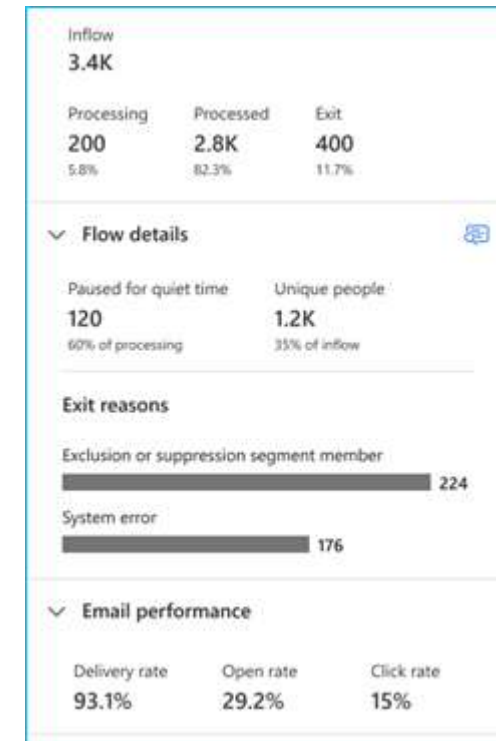
Collect extra event attendee information

- Create a question in the form editor without creating new custom fields for e.g. Contacts
- “What are your dietary requirements?”
- The form field answer is stored only as part of the form submission, so you can access the data anytime without polluting your data.

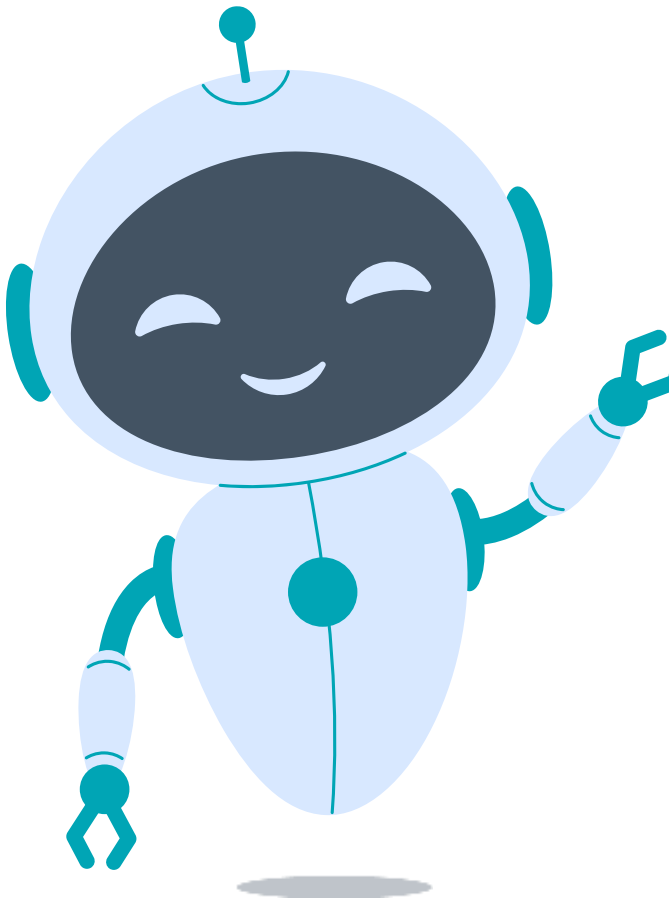


Understand customer inflows and exits

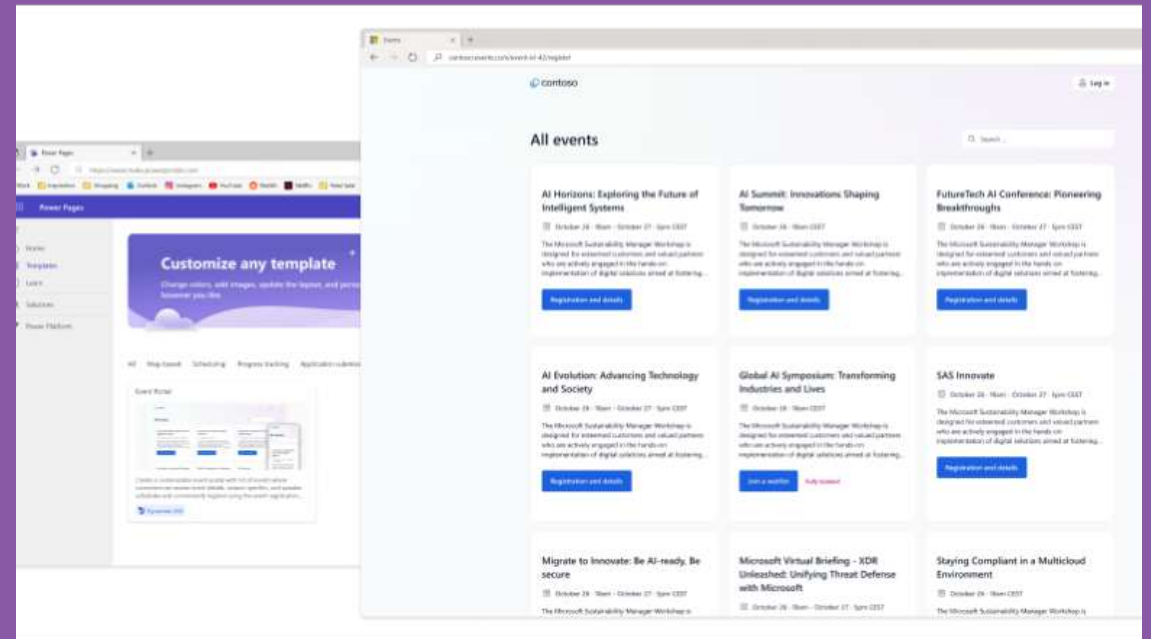
- Gain visibility of who is entering and exiting your journeys
- Export lists of customers who reached each step (up to 50,000 records)
- Understand why and where customers exited your journey before completing each step in the journey flow
- Understand why customers triggered to start your journey didn't reach the first step in your journey



Events Portal

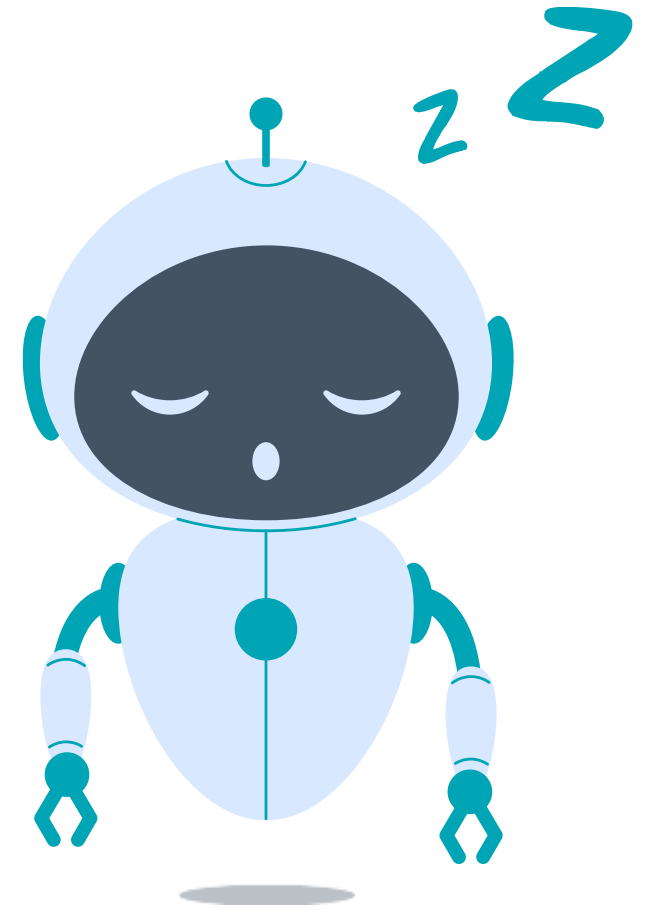


- Finally, we are moving away from Angular and to Power Pages.



One-click unsubscribe

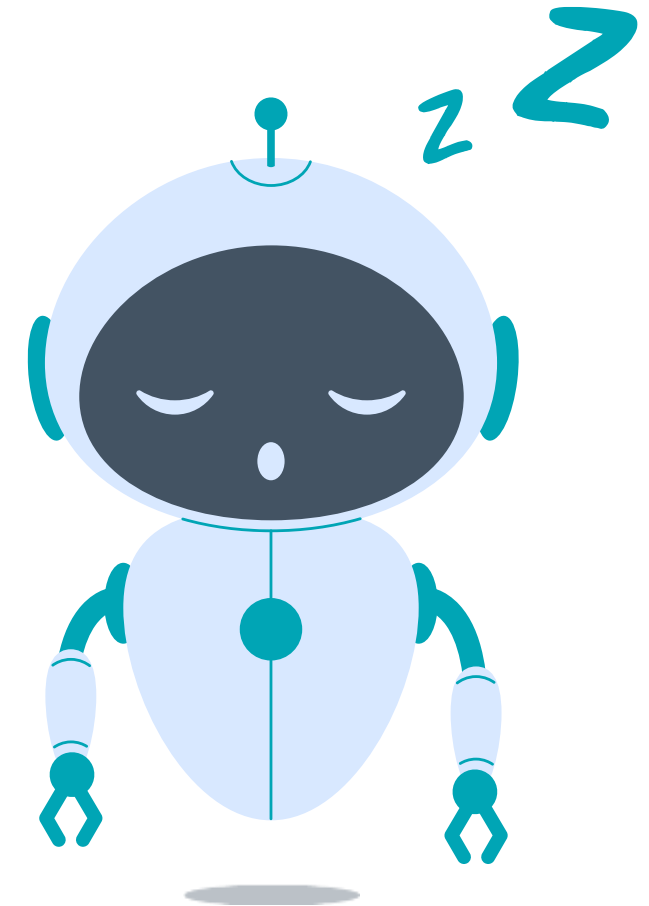
- Designed to meet email compliance standards set by Google and Yahoo
- When the user clicks unsubscribe, their preferences are updated and they are immediately excluded from future journeys
- Helps improve your deliverability and identify your true audience



Custom Hard Bounce solution

- We now have a solution to managing Hard Bounces
- Which can provide Last Bounce Dates, Bounce Types and Bounce Details easily!

Summary Related Leads Details <u>Email Address Validation</u> Communication Lead scores LinkedIn Lead Info Related ▾					
Email Address Validation					
Email Address Bounce Review Required	Yes	Last Email Bounce Date	24/04/2025	11:00	
Last Email Bounce Type	Hard	Last Email Bounce Category	invalid-mailbox		
Last Email Bounce Details	smtp;550 5.1.1 The email account that you tried to reach does not exist. Please try double-checking the recipient's email address for typos or unnecessary spaces. For more information, go to https://support.google.com/mail/?p=NoSuchUser 5b1f17b1804b1-4409d29fe0csi6476355e9.63 - gsmtpt				
		Previous Email Address	[REDACTED]		
		Email Address Changed Date	13/03/2025	09:27	



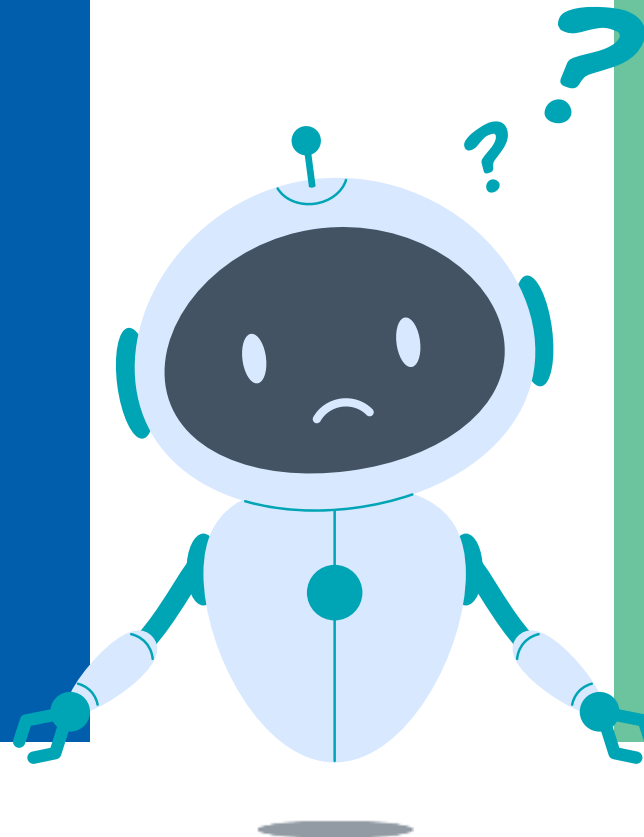
Real-time triggers

Triggers

- Trigger journeys based on web visits, form fills or email interactions
- Trigger journeys based on any field in CRM – 5 steps away from a Contact/Lead

Personalisation

- Use Power Automate to dynamically personalise your Emails based on your data
- Use conditional content to dynamically personalise your images
- Use personalisation to send your emails from any Owning User (Acct. Manager / Sales Person).





DEMO

Pricing

Only if you pay upfront for the year in one go those prices are valid, otherwise slightly more expensive (about 5% higher for monthly pay and annual commitment)

Dynamics 365 Customer Insights

£1,307.20

tenant/month, paid yearly

Deliver connected customer journeys and campaigns with unified customer data.

Price does not include VAT.

Buy now

Contact us

- Unlimited users
- 100,000 Unified People¹
- 10,000 Interacted People²

Dynamics 365 Customer Insights Attach

£769.00

tenant/month, paid yearly

Add connected customer journeys and campaigns with unified customer data to your qualified Microsoft stack.

Price does not include VAT.

Contact us

- Unlimited users
- 100,000 Unified People¹
- 10,000 Interacted People²
- For organisations with a qualifying Dynamics 365 application³



Questions?

Thank you!



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