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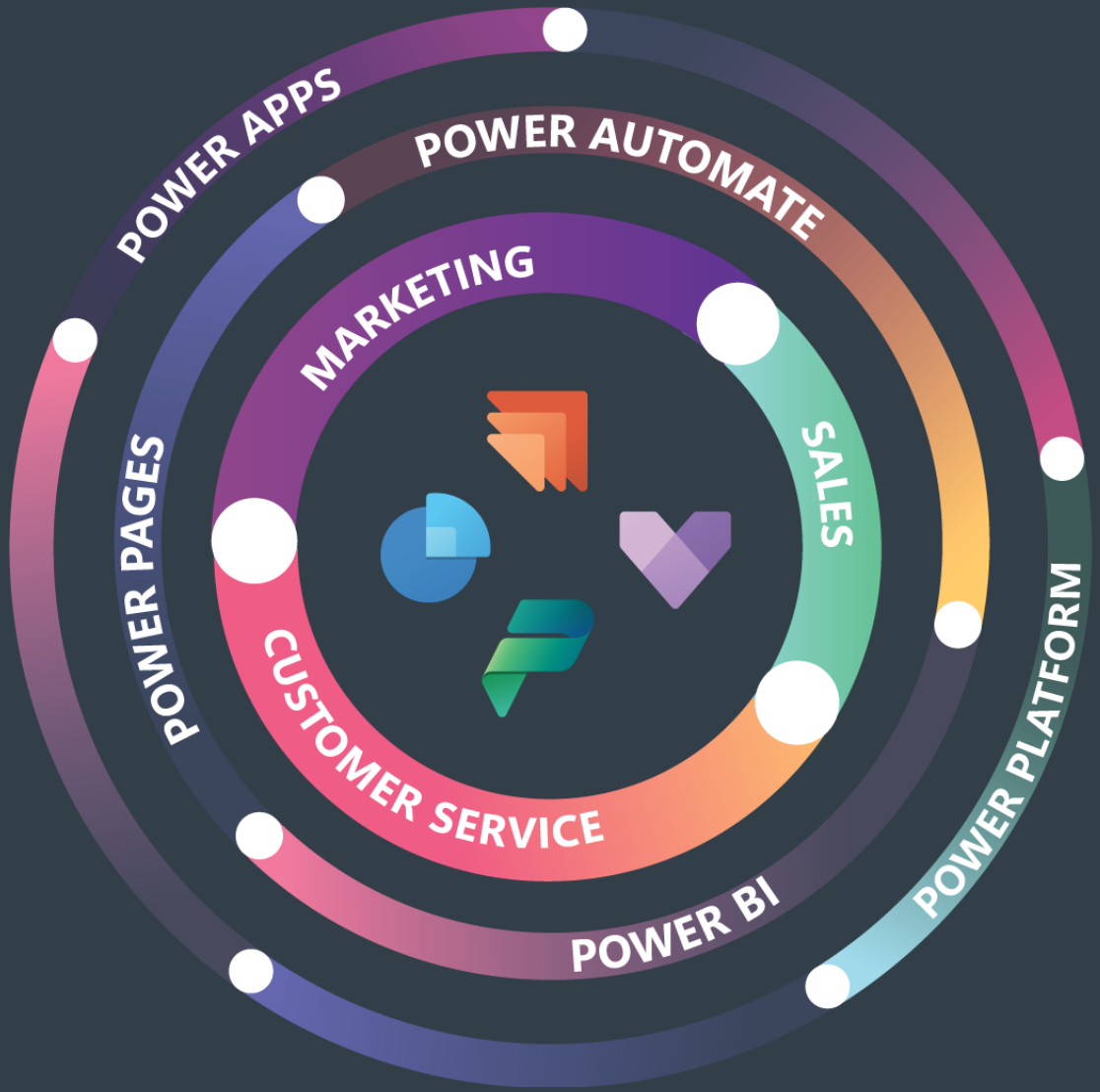
CRM connect



Not just a new name for Dynamics 365 Customer Insights – Journeys

THURSDAY 25 APRIL 2024

Can you hear me?

Is everything clear?

~ 45 mins

Q & A

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Hi!

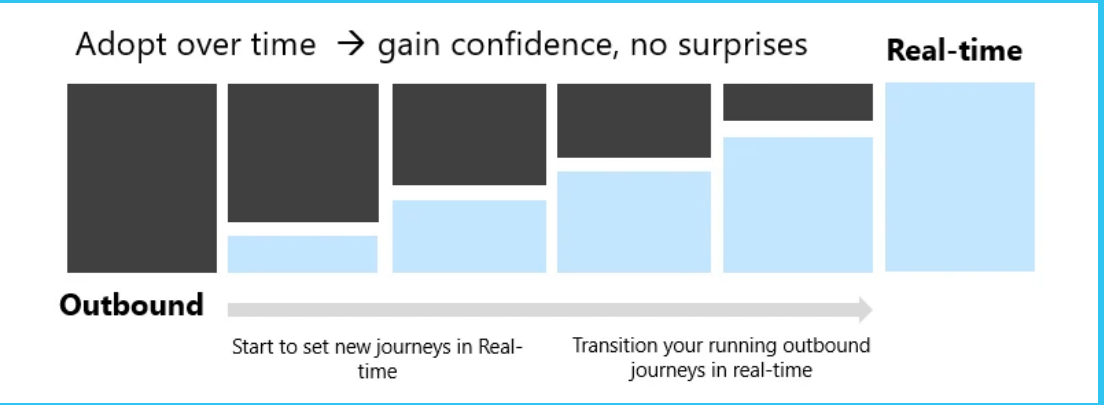
I’m Zak!

What we'll cover

1. Move from Outbound to Real-Time
2. Core Features (Segments/Emails/Journeys)
3. Form Capture
4. Personalisation
5. Triggers
6. Future Features

Moving over to Real-Time

- If you buy a licence today, you will not even see Outbound Marketing
- In September 2023, Marketing joined together with Customer Insights
- You get 2 Apps with the new licence, Journeys and Data
- Marketing used to be 1 Production Only, Customer Insights has scope for 4 Journeys and 4 Data
- Everything Outbound did and more



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Segments

- Target Leads and Contacts in your CRM
- Use attribute data to filter your segments e.g. Contacts in Food Industry
- Use behavioural data from your journeys, emails and forms
- Add any custom table into your dataset configuration
- Preview and estimate your segment members
- Copy your segments
- (Preview) Add groups, **Example:** Let's say you want to create a query for leads with a company size of more than 10,000 employees whose parent accounts are in the Food industry, but not leads with a budget of less than £50,000.

Emails

- Easy to use drag and drop builder
- Personalization to dynamically populate information across any table in the system
- Links to documents and videos in your asset library via file download button
- Preview and test send before distributing your content
- Conditional content that would enable you to personalise imagery e.g. send from owners of records / sales team
- Brand Profiles that pre-fill important data per brand

Compliance

- GDPR is still a hot topic in 2024. Journeys has preview for ‘one click unsubscribe‘ in line with Google & Yahoo’s latest compliance policies
- You can capture consent across Contacts, Leads and Data Profiles
- You can create a Compliance Profile that outlines your company stance on consent.
- There are three different purposes you can define: Commercial Communication, Transactional Communication and Tracking Consent.
- Unsubscribes will tick the ‘Do Not Allow Bulk Emails’, ‘Do Not Allow Emails’ and ‘Do Not Track’ fields

Forms

- You can create and design brand-new forms and host them on your website and all form submissions are captured in CRM
- “I don’t want to redesign my forms”
- OK, you can now use 3rd Party Form Capture. Your form stays the same. Auto-generate JavaScript and place it into your website. Your Form will then capture submissions and store them in Dynamics with the only change you make being adding the script.

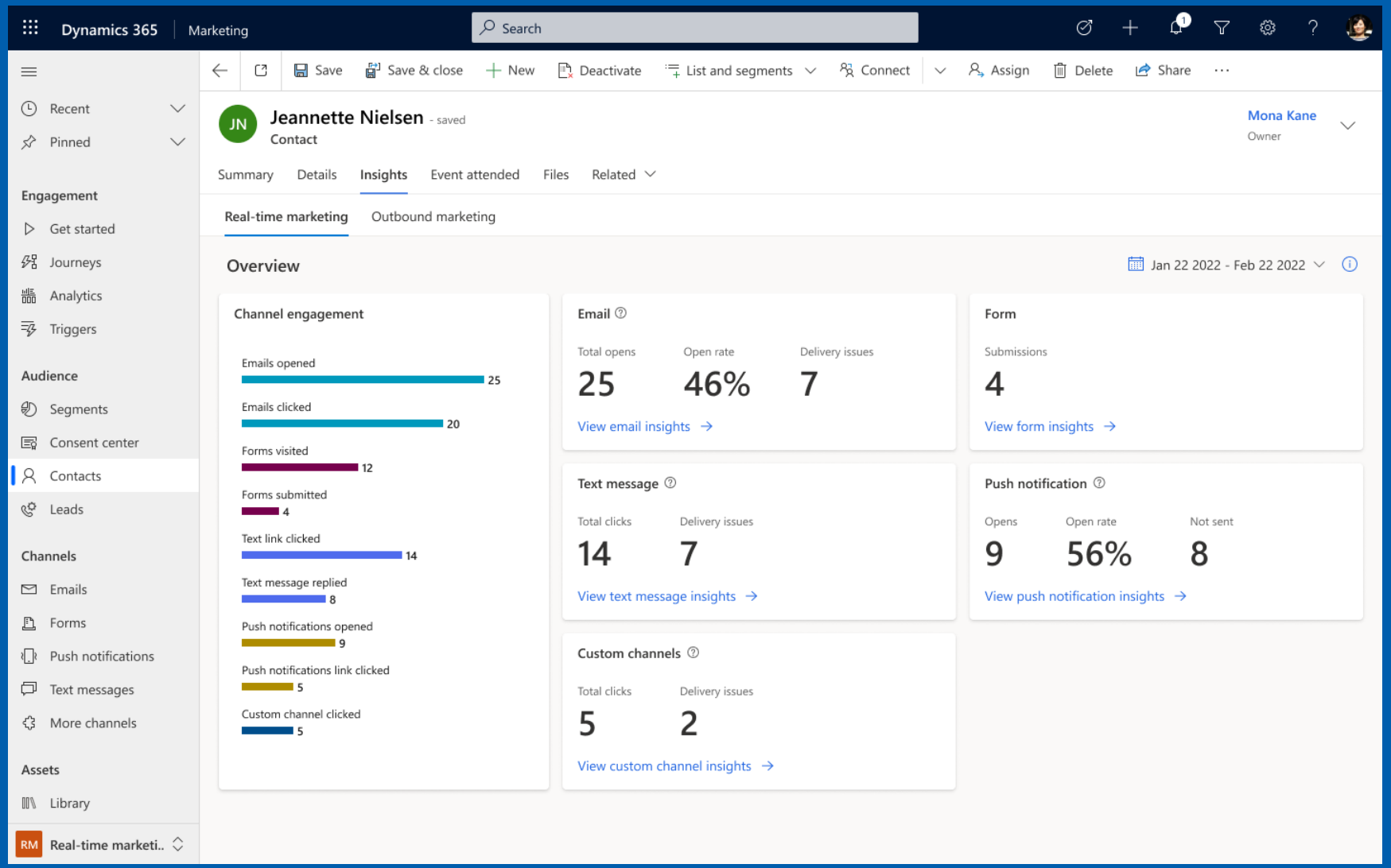
Triggers

- Capture important customer moments and interactions
- Any field on any table changes in CRM, you can build a trigger based on that if it is important to you.
- Examples: Product being purchased on an invoice, a survey being booked, a quote being won.
- Triggers are then used to kickstart the Journeys

Journeys

- Segment based journeys or trigger-based journeys (it's up to you)
- Send emails, texts and push notifications
- A/B Testing and channel optimisation
- Wait times, wait for triggers, send a series or branch based on attributes
- Create phone calls, tasks, opportunities or leads
- Activate a custom trigger from a journey

Insights



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Events

Feature	Outbound marketing	Customer Insights - Journeys
Single session event	Yes	Yes
Multi-session event	Yes	Yes
Session-level registration	Yes	Yes
Recurring event	Yes	Planned
Event level templates	Yes	Planned
Sessions, session tracks, speaker management	Yes	Yes
Venue management	Yes	Yes
Tracking sponsors	Yes	Yes
Creating Teams meetings/live events/webinars	Yes	Yes
Support for On24 and other generic webinar providers	Yes	Planned
Using marketing forms for registrations	Yes	Yes
Event portal landing page	Yes	Planned
Waitlist	Yes	Planned
Payments	Yes	Planned
Lead entity registration	Yes	Planned
Custom registration fields	Yes	Planned
Set registrations end date	Yes	Planned

OK, that's enough slides

DEMO

Dynamics 365 Customer Insights

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The Future

- In app assistance with Copilot. Will help you write emails, build segments and create journeys
- One click unsubscribe
- Building custom Power BI reports using Fabric integration
- A/B Test building directly in the Email builder
- See all your sent emails in the Timeline
- Split a percentage of your audience on a Journey
- 3rd Party Form Capture

Price

Dynamics 365 Customer Insights

£1,397.30

per tenant/month

Deliver connected customer journeys and campaigns with unified customer data. Includes up to 4 environments, 100,000 Unified People[1] and 10,000 Interacted People[2].

Buy now >

Contact us >

Dynamics 365 Customer Insights attach

For organisations with a qualifying Dynamics 365 application[3]

£821.90

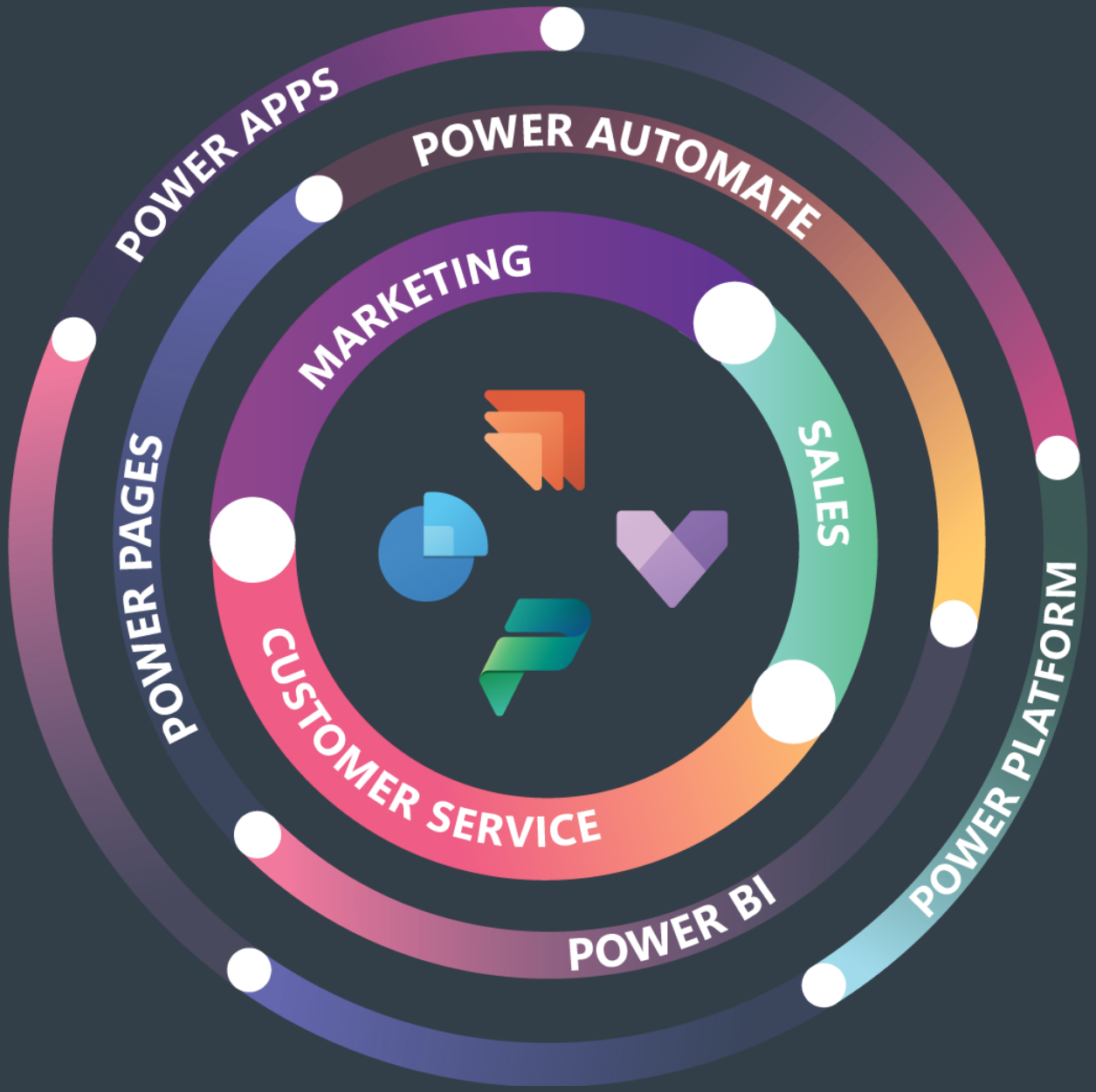
per tenant/month

Add connected customer journeys and campaigns with unified customer data to your qualified Microsoft stack. Includes up to 4 environments, 100,000 Unified People[1] and 10,000 Interacted People[2].

Contact us >

Learn all about Data

- Discover the New Kid on the Block: Dynamics 365 Customer Insights – Data 2:30pm – 3:15pm

Thank you.

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