DYNAMICS 365 AND MARKETING AUTOMATION

March 14, 2018
Today’s speaker

Sy Nayman  
Consulting Manager, Technology & Management Consulting  
- 20 years’ marketing practitioner, hand in hand with sales  
- Product manager  
- Healthcare, financial services, B2C e-health, B2B tech  
- RSM, National CRM, Marketing Automation
CHAT IN YOUR QUESTIONS
KNOW PROSPECTS ONLINE, ACQUIRE CUSTOMERS AND GROW THE RELATIONSHIP

... And the role of marketing automation
Presentation Topics

- Marketing Automation starting points
- Key areas of change that constrain marketing automation value
- Marketing automation examples: engagement, triggers, actions
- Technology selection
- Q&A

Extra: Cookbook of Microsoft CRM customizations and reporting for marketers
Learning Goals

Marketers

• Gather detail for your marketing automation roadmap
• Know key points of collaboration and the right, cross-functional project team for success

CRM owners

• Take away ideas on scope of implementation, know the key areas of system change
• Gather some definitions of done
STARTING POINTS
Where to take the first bite out the elephant
### Marketing Automation Maturity

<table>
<thead>
<tr>
<th>Blasters</th>
<th>Campaigners</th>
<th>Optimizers</th>
<th>Predictors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automation used for email send and template functions</td>
<td>Automation and CRM used to plan, measure and execute campaigns</td>
<td>Automation and CRM used to improve flow of leads through a defined lifecycle</td>
<td>Automation, CRM, Analytics forecast predictable revenue from a prospect-led process</td>
</tr>
<tr>
<td>Marketing and sales work separately without formal lead management processes</td>
<td>Processes for handing off prospects between teams</td>
<td>Defined interactions across all teams for lead lifecycle stages</td>
<td>All teams deliver personalized communications based on historic interactions</td>
</tr>
<tr>
<td>Marketing blasts email to whole database</td>
<td>Marketing runs targeted campaigns</td>
<td>Campaign content tightly aligned with lead information needs at each lifecycle stage</td>
<td>Campaigns and lead nurturing adjust content based on recent interactions</td>
</tr>
<tr>
<td>Leads are scored and assigned based on demographics</td>
<td>Leads are scored based on demographics + behavior</td>
<td>All teams add information to lead/contact profile based on personal and digital interactions</td>
<td>Lead scoring based on multiple channels</td>
</tr>
<tr>
<td>No lifecycle-based segmentation</td>
<td>Marketing uses one nurture campaign for all contacts</td>
<td>All teams coordinate constant contact with leads and customers</td>
<td>All teams coordinate constant contact with leads and customers</td>
</tr>
</tbody>
</table>

**Predictors**

- Automation, CRM, Analytics forecast predictable revenue from a prospect-led process
- All teams deliver personalized communications based on historic interactions
- Campaigns and lead nurturing adjust content based on recent interactions
- Lead scoring based on multiple channels
- All teams coordinate constant contact with leads and customers
Mature Sales and Marketing processes example

**Red:** marketing automation solution scope

**All** processes in CRM scope
Try These Marketing Automation Roadmap Priorities

Sales and marketing process
- Lead management
- Quality
- Volume

Data and segmentation
- Demographic
- Behavioral
- Trigger
- Selling activity
- e-Commerce activity

Marketing channels
- Website
- Email
- Online Events
- Social
- Call center

Reporting
- Engagement
- Influence
- Optimization
- Attribution

START?
CHANGE MANAGEMENT

Key constraints to consider
Technology Stack Acquisition Scenario

3rd Party Data Sources

Social
Instagram

Paid Search
Google AdWords

Website, CMS

Marketing Automation System
act-on

CRM
Microsoft Dynamics 365

Analytics
Google Analytics
Power BI

Social Publishing
FALCON.IO

Got Data Integration?

Marketing Sponsored

IT + Sales Sponsored
Data Integration and Forms

Browser
Landing Page
Form
Marketing Automation System
CRM
Data Integration Web Tracking

Browser

Cookie from email or form

Web Page

Visit

Marketing Automation System

CRM
CRM Entity Relationships

Campaign Responses make Leads

Contacts, Account + Opportunity

Contacts, Campaign Responses, Account, Opportunities won/lost

Deal Value $100,000
# Data: Capture All Engagement Activity Types

## Tactics & Measures

<table>
<thead>
<tr>
<th>Tactic</th>
<th>Measure of Interaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live Events</td>
<td>Registration, Attendance</td>
</tr>
<tr>
<td>Webinars</td>
<td>Registration, Attendance, Online View</td>
</tr>
<tr>
<td>Email</td>
<td>Click, Form Submit</td>
</tr>
<tr>
<td>Direct Mail</td>
<td>-</td>
</tr>
<tr>
<td>Social Media</td>
<td>Engagement, Click, Form Submit</td>
</tr>
<tr>
<td>Outbound Call</td>
<td>Connects</td>
</tr>
<tr>
<td>Website, personalized</td>
<td>Lead or Contact Visits, Form Submit</td>
</tr>
</tbody>
</table>
Data: Fields Consistency and Normalization

Goals:
• Know which fields you can use for segmentation by surveying utilization of the field (% null value)
• See variation in available field data. E.G., “US” or “USA”. Batch rewrite normalized values to new fields (preserve old).
• Find opportunities to offer users option lists versus text entry

Tools:
• MSCRM, Reporting Wizard, SQL Server Reporting Services (SSRS)
• SalesForce, Field Trip – can be used to provide field values and counts, including “null”
Your Business’ Data May be Insufficient

Sales activity, order history ≠ usable segmentation

Consider 3rd party data sources:

KEEP CALM AND FRESHEN UP

AUGMENT
Plan for change in these areas

• Business Definitions and Measures: What’s customer satisfaction? What’s a good Lead? (Quality)

• Marketing and Sales service level agreements

• Chartering marketing automation projects when it’s not the participants’ day job
REMINDER: CHAT IN YOUR QUESTIONS

Stump the presenter and get a $15 Starbucks card
Anonymous Visitor Identification

Visitor → Web Content Offer → Click Download → Visitor + IP Addr. Cookie → Tracked Anonymous Visitors

Visitor Self-Identification

Visitor → Web Content Offer → Form Submit → Leads

Lead Prospecting

WEEK 1
- Introduction, ask, about
- Educate, edu link, ask, about

WEEK 2
- Educate, edu link, ask, about

WEEK 3
- Educate, edu link, ask, about

WEEK 4
- Educate, edu link, ask, about

IF Demographic, behavior match THEN assign to field rep

Drip email, specific to conversion offer

Lead dev rep, outbound calling

©2016 RSM US LLP. All Rights Reserved.
Change Management: Inbound, Campaign Responses

Form Submit → Create CRM Campaign Response → Match Campaign Response to existing Contacts, update → Assign unmatched Campaign Responses → Verify Campaign Response → Convert to new Contact

Marketing Manager
- Verify for Lead Nurture
  - Convert to new Contact, marketing-owned
  - Manual add to Nurture Series

Sales Person
- Create a task on existing Contact
- Close the Campaign Response

Campaign Responses Aging Report
MARKETING AUTOMATION FOR DYNAMICS 365 / SALES
Technology Directions, Impressions
Technology Selection

• It’s a big investment: time, process change, data
• Do NOT buy on features comparison
• DO define your business requirements for the system and develop an RFP with IT, Marketing and Sales
• 15 vendors reviewed: https://www.act-on.com/resources/gartner-magic-quadrant/
## Solution in Dynamics 365/Sales

<table>
<thead>
<tr>
<th>Pros</th>
<th>Cons</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Simple integration: solution installed in CRM</td>
<td>• Marketers dislike D365/Sales user experience</td>
</tr>
<tr>
<td>• Good email and Web channel tools</td>
<td>• Lacks automation trigger from Advanced Find</td>
</tr>
<tr>
<td>• Surveys!</td>
<td>• CRM Workflows required for some lead capture and automation scenarios</td>
</tr>
<tr>
<td>• Minimum compliment of automation triggers and actions</td>
<td>• Non-responsive HTML landing page editor</td>
</tr>
<tr>
<td>• Some connectors to 3rd party applications</td>
<td>• CRM customization required for some aggregate reporting</td>
</tr>
<tr>
<td>• ClickD is attentive to customers</td>
<td>• All in with Microsoft</td>
</tr>
</tbody>
</table>
## Vendor Supported Integration to D365/Sales

<table>
<thead>
<tr>
<th>Pros</th>
<th>Cons</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Vendor-supported integration to Dynamics 365/Sales</td>
<td>• No native surveys</td>
</tr>
<tr>
<td>• Active lead pricing model</td>
<td>• Sales and Marketing process definition required</td>
</tr>
<tr>
<td>• Many templates, responsive HTML</td>
<td>• Detailed data fields design required</td>
</tr>
<tr>
<td>• Advanced automation, including direct mail trigger</td>
<td>• Market disruption</td>
</tr>
<tr>
<td>• Many connectors to 3&lt;sup&gt;rd&lt;/sup&gt; party applications</td>
<td></td>
</tr>
<tr>
<td>• SalesForce and D365/sales focus</td>
<td></td>
</tr>
</tbody>
</table>
## Market Leader, Mid Size

<table>
<thead>
<tr>
<th>Pros</th>
<th>Cons</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Head to head with Act-On, similar scope and maturity of features</td>
<td>• 3rd party middleware integration to D365/Sales</td>
</tr>
<tr>
<td>• Leading installed base</td>
<td>• Database size pricing</td>
</tr>
<tr>
<td>• Early mover, large product investment</td>
<td></td>
</tr>
</tbody>
</table>
Question Marks and New Entrants

• Dynamics 365 for Marketing – in public preview
  – Under evaluation, chat Sy Nayman
    sy.nayman@rsmus.com for follow up
  – It’s the D365 UI and it’s a new MS product?

• Adobe Marketing Cloud?
  – A big solution, fortune 1000 clients
    • Hosted solution
    • 3 major products
    • Min. 18 month installation
  – 2016-17 PR blitz appears to be related to planned use of MS compute cloud for some Adobe product components
CRM CUSTOMIZATIONS & REPORTING THAT MARKETERS REALLY WANT

Cookbook: Contact, Campaign, PowerBI
Campaign Entity Customization

• Calculated fields customization
• Switch to https://rsmacton.crm.dynamics.com/
  – Campaign, Lunch and Learn
Campaign Responses

• [https://rsmacton.crm.dynamics.com](https://rsmacton.crm.dynamics.com)
  – Lunch and Learn

• Associating form submissions and Web visits as campaign responses
  – ClickDimensions automation in CRM
  – Act-On, Hubspot campaign responses
Key Customizations, Lead, Contact, Opportunity

• Lead, Rozella Ostrosky
  – https://rsmacton.crm.dynamics.com
    • Fields
      – Stages
      – Lead source
  – https://rsmcd.crm.dynamics.com
    • Satya Nadella, CD marketing details view

• Opportunity, Tri M Tools
  – https://rsmacton.crm.dynamics.com
    • Fields
      – Lead source
      – Opportunity source campaign
      – Other: product line items
Power BI Data Visualization

The Office 365 Cloud

On Premise Data Stores
- Microsoft Dynamics GP
- Microsoft Dynamics 365
- SQL Server
- Excel

Other Cloud Sources
Finish Line. You Made It!