

Dynamics 365 Marketing Tech Talk

Turgay Alptekin
Senior FastTrack Solution Architect

Kolappan S
FastTrack Solution Architect

Agenda



**Introduction to
Dynamics 365 Marketing**

Functionality & Architecture Overview

Licensing & Positioning

Configuration & Management

Best Practices

Extensibility & Reporting

Data Protection & Resources

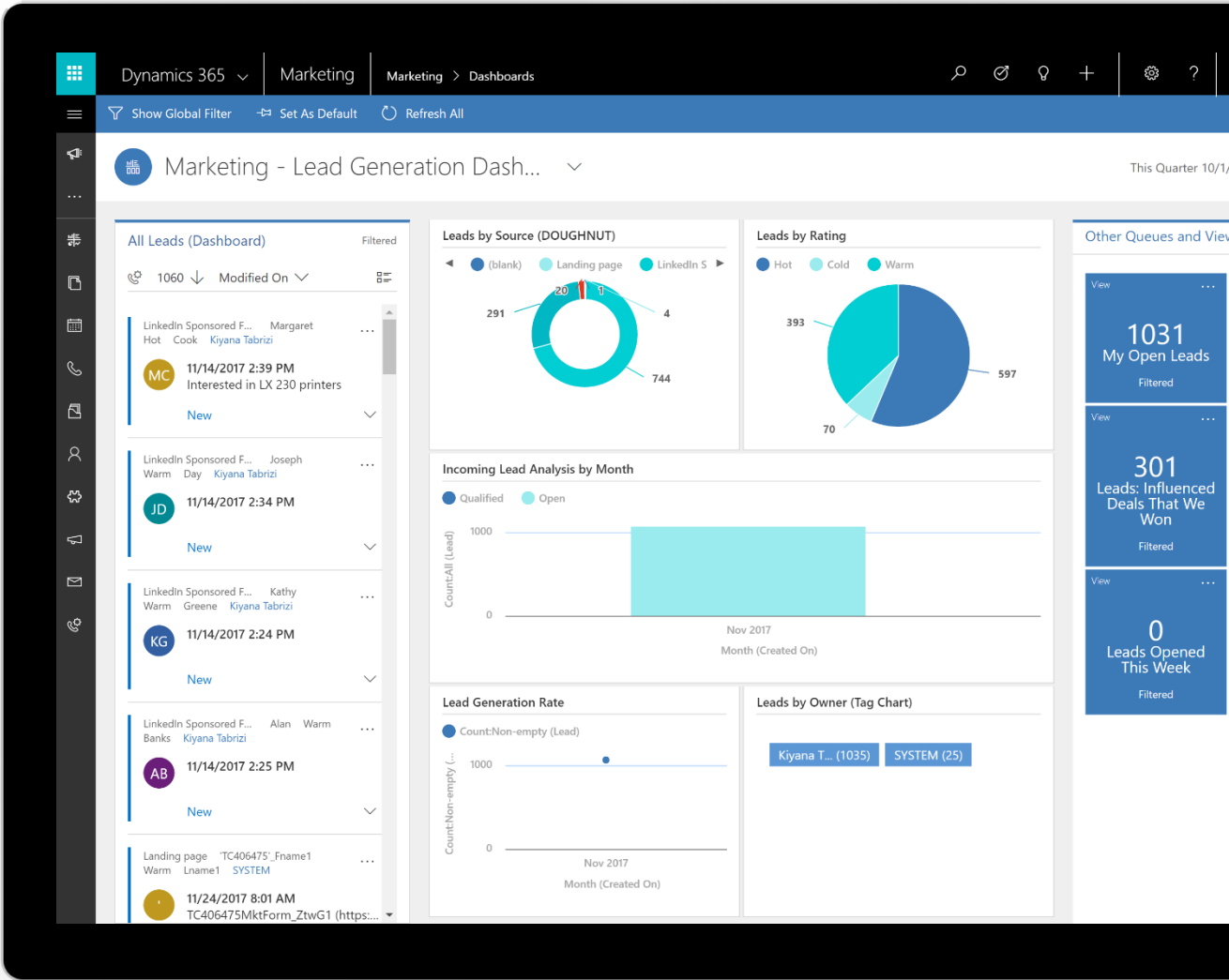
Introduction-Dynamics 365 Marketing



Our goals

Make prospects into business relationships

- Help businesses nurture more sales-ready leads
- Align sales and marketing with common data and connected business process in unified platform
- Make smarter decisions with interactions insights
- Grow their operations with an adaptable platform



"Why" Dynamics 365 Marketing



For Customers

Secure, trusted and compliant
Microsoft Azure cloud

Lives together with Dynamics 365 for
Sales on the same DB and platform:
sharing base entities, content etc.

Unique capabilities such as
integrated event management,
Interactions insights and LinkedIn
deeper integration

Scalable architecture that manages
contact and interactions data
separately
Familiar and easy-to-use UI (v9)



For Partners

Use same CDS customizations as
Sales and Service in Marketing

Same concepts, toolset and
environment as CDS / Power Apps

Same compliance level as Microsoft
products

Integrated platform for marketing
leveraging Microsoft applications
and infrastructure (Dynamics, CDM,
CDS, ML, Microsoft channels)

Reliable performance and scale on
Azure



For Microsoft

Microsoft is the only enterprise
Customer Engagement provider that
offers a completely "organic" suite of
applications via CDS

Strategic Marketing platform for
Sales, Service and Dynamics
workloads for marketing integrations
online

Functionality Overview



Dynamics 365 Marketing

Feature summary

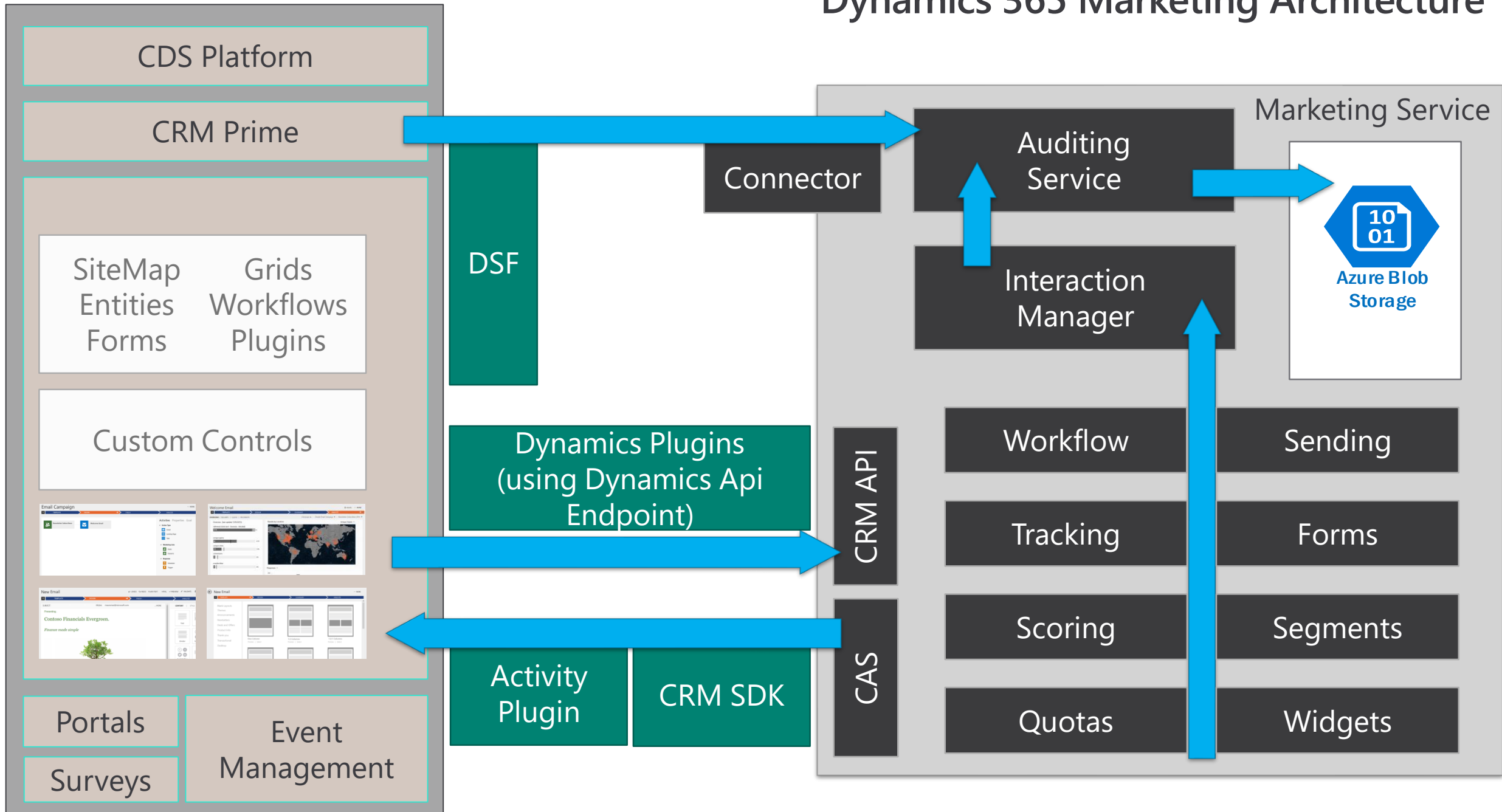
Lead capabilities

Multi-channel campaigns	Lead nurturing	Event management	Insights and reporting	Unified platform	AI capabilities
Email marketing with A/B testing and quick send **	Customer journey designer	Webinars integration	360-degree view of leads	Integration with content management systems	Smart scheduling
Landing pages, forms and website personalization	Dynamics Customer Insights integration*	Events portal	Customer Interactions insights	Sales integration	Segment boost
Reusable content blocks and videos	Dynamic segmentation and multiple lead scoring	Sessions, speaker and venue management	Surveys with Microsoft Form Pro**	Easier set up**	Spam score
LinkedIn and social integration	Account based marketing	Registration and attendance tracking	Custom analytics	Approvals with Microsoft Flow*	
Marketing support for Business units **	Automated business process flows	QR codes and wait listing*		Extensibility for campaigns and segments	
Marketing calendar					

* New ** Enhanced in Oct'19 release

Architecture Overview

Dynamics 365 Marketing Architecture



Dynamics 365 Marketing Architecture Overview

- ❖ Dynamics 365 Marketing leverages Common Data Service (CDS) entity schema and data such as contacts, accounts, leads, or custom entities, etc) for Marketing activities.
- ❖ Configuration data are stored in underlying CDS environment.
- ❖ Required CDS entity data are replicated to Marketing engine outside of CDS environment, but still within Azure infrastructure. Seamless integration between CDS and Marketing engine.
- ❖ Configurable options are available for admins to selectively specify the entities for marketing purpose.
- ❖ Marketing related activities such as segmentation, email messaging, tracking, capturing user analytics, etc are handled in the marketing engine.
- ❖ Power BI connectors available to interact with Blob storage part of Marketing engine and fuel the data to Power BI.

Dynamics 365 Marketing Licensing

Dynamics 365 Marketing Licensing Highlights

- ❖ The Marketing application is licensed per organization and is based on contacts used in Dynamics 365 for Marketing. Different from Dynamics 365 Apps licenses.
- ❖ Dynamics 365 Marketing application licenses assigned at the tenant level
- ❖ All marketable contacts used in a tenant are counted irrespective of instance (production and non-production). Customers will only be charged for Contacts that are engaged in marketing activities using the D365 for Marketing application
- ❖ Types of Dynamics 365 Marketing licenses

Dynamics 365 Marketing (standalone)

- ✓ Base Contacts/Month= 10K
- ✓ For additional contacts SKU, purchase marketing attach license, packs available from 5k-500k contacts
- ✓ No Dynamics 365 purchase is required for this standalone application (**or**) the customers with fewer than 10 Dynamics 365 apps licenses(sales/service/PSA etc)

Dynamics 365 Marketing Attach

- ✓ Base Contacts/Month= 10K
- ✓ Additional contacts SKU = Pack ranges from 5k to 500K
- ✓ Included for customers with atleast 10 Dynamics 365 apps plans license

Dynamics 365 Marketing Additional Application

- ✓ Base Contacts/Month= contacts are pooled at tenant level, not included in this offer
- ✓ Two separate options – Production and non-production marketing application.
- ✓ For additional contacts SKU, purchase marketing attach license

Dynamics 365 Marketing Licensing Highlights

- ❖ Resources for reference - Dynamics 365 Marketing
 - [Dynamics 365 Licensing Guide](#) (Search for Dynamics 365 Marketing)
 - [Frequently Asked Questions](#)

Dynamics 365 Marketing Configuration & Management

Dynamics 365 Marketing Configuration Experience

- ❖ Access <https://admin.microsoft.com> using global administrator access and ensure Dynamics 365 Marketing product license(Production or non-production application type) is added to your Microsoft 365 tenant.
- ❖ Unused marketing application(s) would be available under applications tab of the Dynamics 365 admin center with the status "Not Configured"
- ❖ Dynamics 365 Marketing application configuration highlights
 - ✓ Configured through Microsoft 365 admin center.
 - ✓ Centralized wizard experience for easy and seamless configuration
 - ✓ Configured on top of a specific Dynamics 365 Apps application
 - ✓ 1 Dynamics 365 application is configured with 1 Dynamics 365 customer engagement instance only
 - ✓ Flexibility to configure marketing landing pages/event websites to your own web server or with dedicated Dynamics 365 portal
- ❖ Refer [this link](#) for detailed steps on how to set up Dynamics 365 Marketing
- ❖ If leveraging customer owned CMS, do not need to install portal during Marketing setup

Receive updates in Dynamics 365 Marketing Application

How to receive updates to Dynamics 365 Marketing applications

- ❖ Microsoft is continuously developing and improving online services, Microsoft doesn't apply them automatically to customer's marketing systems.
- ❖ New update notification is provided in the individual D365 for Marketing applications. Customers have an ability to manually initiate and apply the updates.
- ❖ Seamless upgrade to the latest version
- ❖ Refer the link here for detailed steps:
[How to consume upgrades for D365 for Marketing](#).
- ❖ Would need to apply the upgrades in each of the D365 Marketing applications in the tenant through Dynamics 365 Admin Center

Best Practice

- ❖ Do not apply the upgrades directly in production environment first. Prefer to apply these updates on a sandbox environment first and test the application. If everything looks good, proceed to apply on to a production environment.

Future state

- ❖ In the future, Microsoft would be applying the updates automatically in all the Marketing applications available in the customer's tenant.

Best Practices for Dynamics 365 Marketing Features

Best Practices – E-Mail Marketing

Clean Content



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

Authenticate



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

Prevent Hard-Bounce



D365 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

Best Practices – E-Mail Marketing

Recommended volume



500K e-mails per day per org is recommended for now
It will be increased up to 1 million in upcoming period

Recommended size



- E-Mail Size Limit: 128 KB, no attachment is allowed so far
- Max size per image: 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

Best Practices – Orchestration

Contact Entity



Only entity to specify recipients, filtering can be performed using contact related entities

Marketing Forms



Each field must map to a contact or lead field in D365 database
Deleting D365 Apps fields will not delete the field from Marketing Forms

Approval Process



Prevent sending mass e-mails by mistake

A/B Testing



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

3rd Party SMS Component



Check and possibly test if product is available for region/language

Best Practices – Orchestration

Segment



- Use dynamic segments whenever possible
- Don't have more than few hundreds of *active* segments
- Enable [scoping](#) for BU specific contacts

Segments Members



Static segments can have limited members

Segment Data



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

Segment Design



- Design segments starting from lowest-tier
- Leverage templates

Best Practices – Marketing ALM Strategy

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. Interaction data cannot be transferred, statuses will be “draft” instead live.

Backup/Restore/Copy



- Follow [official guideline](#)
- Regular D365 Backups do not include interaction data
- Copy won't work for interaction data
- Work with support in-case any restore need until we provide functionality for it

Best Practices – Events Management

**Have right team to
customize**



Angular skill is needed to customize portals (ability to work on liquid templated)

**Content
Management System
(CMS)**



If you have own CMS, use it and even do not install Portal during Marketing setup

**Recommended data
volume**



Try to not have more than 50K Events/Sessions/Passes (entity records)

Extensibility

Extensibility



Dynamics 365 CE Extensibility

CRUD Operations on Marketing Entities

Plugins/Workflows on any Marketing Entity

Retrieve Interactions



Extensibility on state changes

Extensibility to create approvals feature, possibly including integration with Power Automate



Extend Marketing Forms using JS

Marketing forms can be extended using JavaScript to perform custom business actions like validations



Custom Event Website

Register to events
View speakers, session schedule, venues, purchase passes and more



Custom Channels

New channels can be added to campaign orchestration
Seamless experience for users on designer, insights

ISVs can deliver additional channels via AppSource



Webinar & Online Payments for Events

Any session or event can function as a webinar (currently with On24)

Enable payment gateway to sell event passes

Using Dynamics 365 CDS Extensibility

[CRUD Operations on Segments\(static/dynamic\)](#)

(msdyncrm_segment, msdyncrm_segmentquery)



[CRUD Operations on Customer Journey](#)



Plugins/Workflows on any Marketing Entity



[Retrieve Interactions for a contact](#)

(msdyncrm_LoadInteractionsPublic)



Custom channels and tiles

Fully Integrated with
Journey Designer



Custom Interactions
are stored with built-
in ones



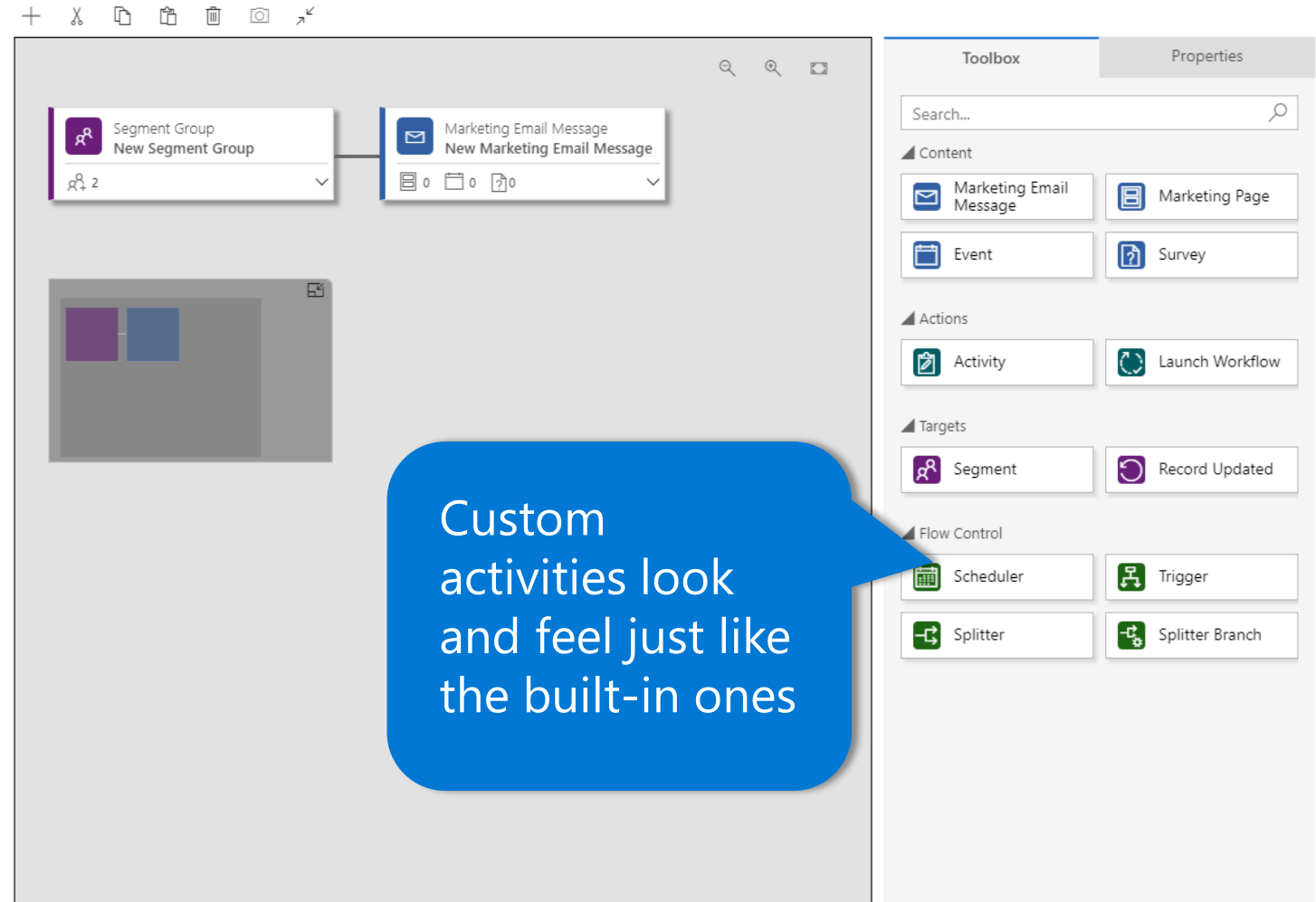
Custom Interactions
Behave as built-in ones



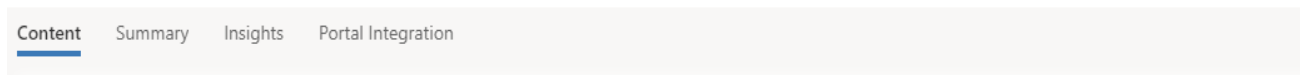
Custom triggers are
defined by each
custom tile



See [Product Documentation](#) for
more details



Extend Marketing Forms using JS



Designer | **HTML** | Preview

Content | Summary | Portal integration | Insights | Related

Designer | **HTML** | Preview

```
1 <html><head><meta name="type" type="xrm/designer/setting" value="marketing-designer-content-editor-document">
2
3
4 </div><div data-editorblocktype="FormBlock" data-form-block-id="9d30b4aa-bb54-e911-a970-000d3af06590"></div><
5
6
7 <div class="ms_crm_trackingscript_base">
8 <div id="dWRbMKxRa9zLoQzTSya0uaqmFCfWT4pTITBuVnYIys2g"></div><script language="javascript" type="text/javascr
9 </div>
10 </body></html>
```

```
MsCrmMkt.MsCrmFormLoader.onformsubmit = function(formPageId, formEvent) {
// sample validation - check if
document.getElementById('txt-company-name-message').style.visibility = 'hidden';
var companyName = document.getElementById('txt-company-name').value;
if (companyName !== 'Fabricam' && companyName !== 'Contoso') {
document.getElementById('txt-company-name-message').style.visibility = 'visible';
formEvent.preventDefault();
}
}
```

Extensibility on state changes

To cover approval scenarios

Entities: Customer journey, content settings, segment and marketing email, page, form

Do not remove any of the existing states

Develop Plug-ins to prevent users from going live from any unapproved state

See [Marketing Approvals Feature](#) for more details



Status Reason Transitions

☐ Enable Status Reason Transitions

Current Status Reasons

Draft

Live

Stopped

Live, editable

Error

Going live

Stopping...

Approve

Need approval

New Status Reasons

Going live; Expired; Need approval;

Stopping...; Stopped; Going live; Live, editable; Error;

Expired; Going live; Need approval;

Live; Error; Going live;

Going live; Stopping...; Need approval;

Live; Error;

Stopped; Error;

Going live;

Approve; Draft; Error; Expired; Stopped; Stopping...;

Reset

OK

Cancel

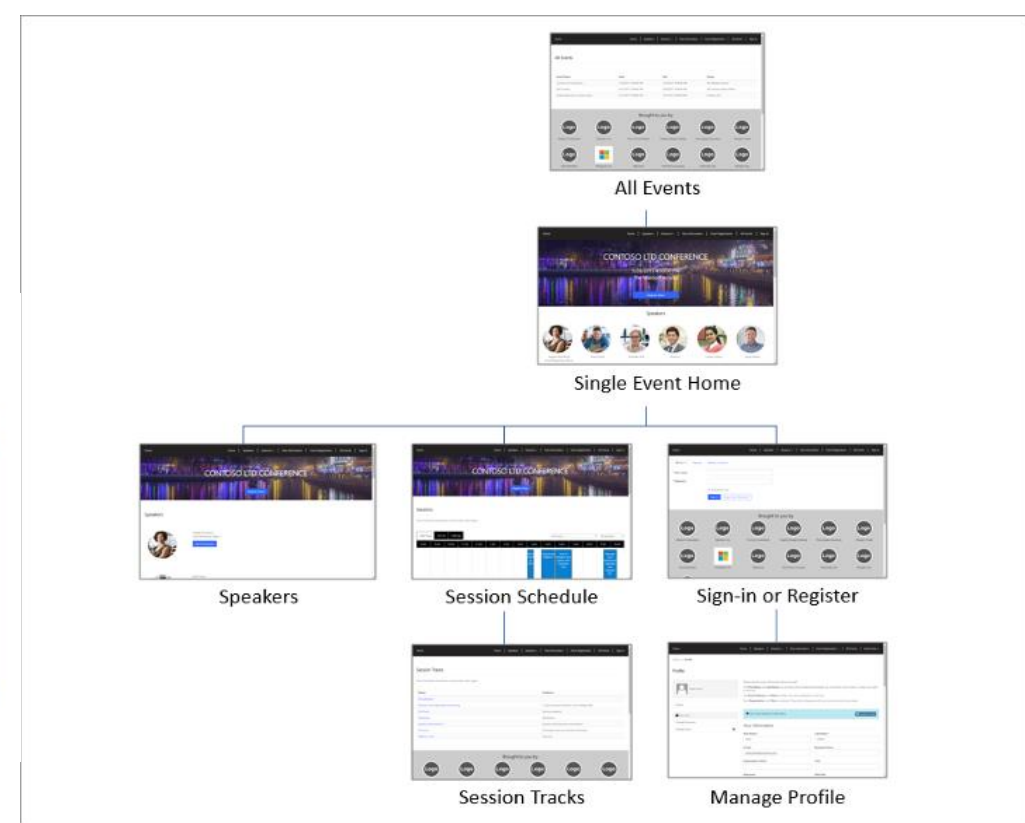
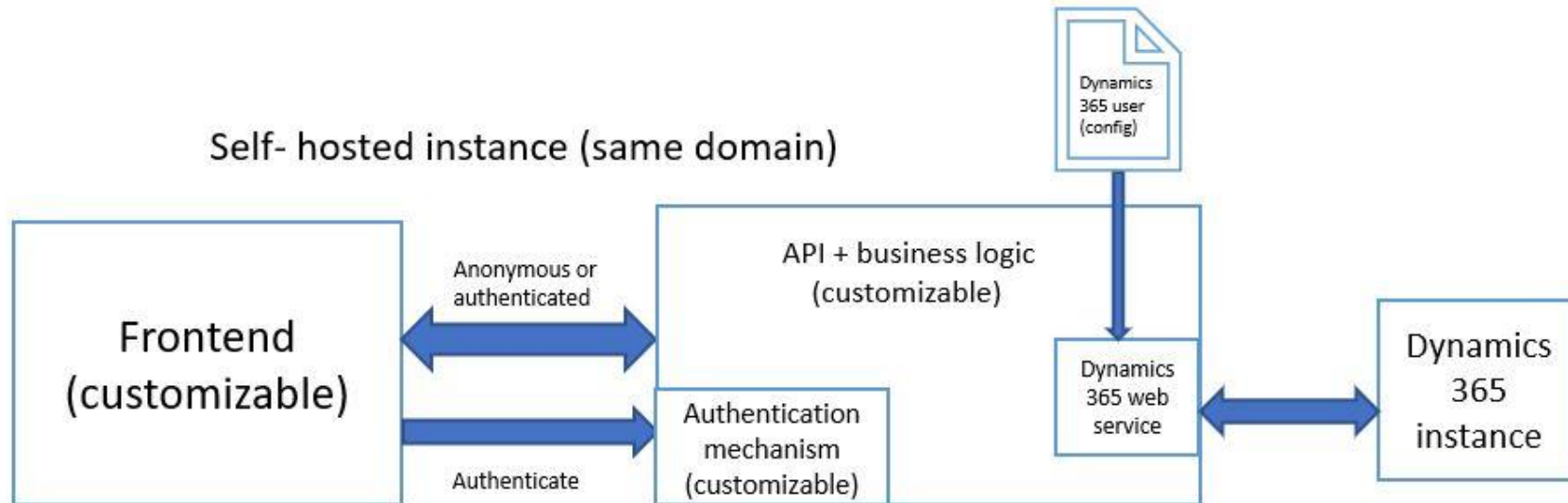
Function name	Description
MsDynCrmMkt.ExtensibilityCallback.liveEditablePreAction	Used to introduce the code that executes before an entity enters the live editable state.
MsDynCrmMkt.ExtensibilityCallback.customUpdateFormControls	Triggered when the main form of the entity executes. This gives the possibility to unlock all the controls of the page and make them editable.
MsDynCrmMkt.ExtensibilityCallback.canGoLive	Gives the ability to completely override the logic to show or hide the Go live ribbon.
MsDynCrmMkt.ExtensibilityCallback.preventSave	Allows to control the save behavior of the entity.
MsDynCrmMkt.ExtensibilitySupplier.entityValidator	Returns a validator factory. Once correctly initialized, can be used to verify that the configuration of the specific entity is valid.

Custom Event Website

Dynamics 365 Portal instance



Self-hosted instance (same domain)

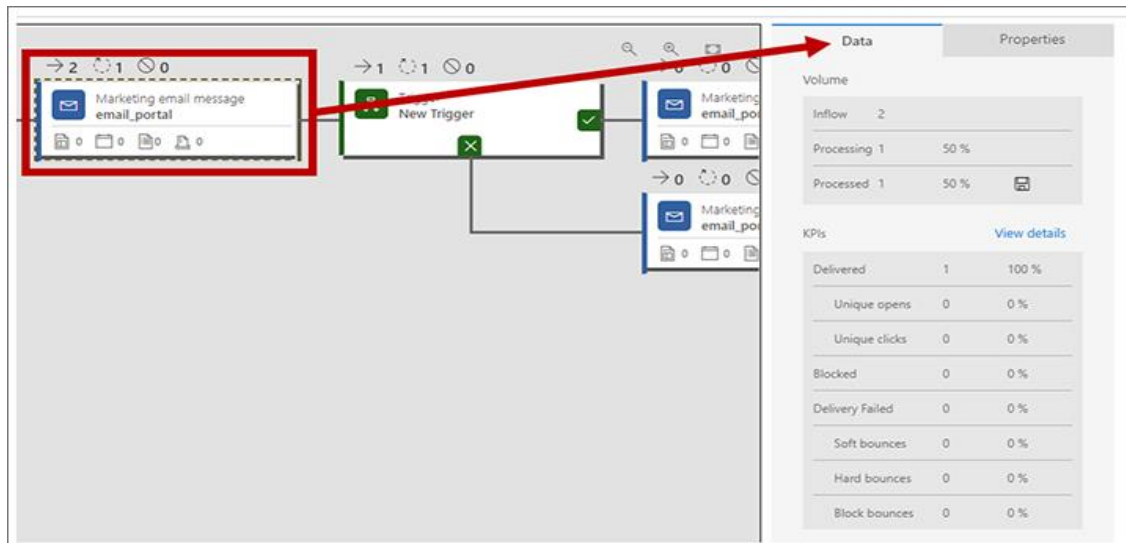


Reporting with Dynamics 365 Marketing

Reporting

Insights

- Graphs, timelines, and values for a wide variety of results, interactions, and key performance indicators (KPIs).
- Insights by contacts, leads, customer journeys, e-mail messages...
- E-Mail opened, hard/soft bounced, click-through rate, form submitted, website clicked...



The top screenshot shows the 'Email_all domains' insights page. It features a navigation bar with 'Design', 'Summary', 'Insights', and 'Related'. The 'Insights' tab is active, displaying filters for 'Customer journey: CJ_All domains', 'From: 22.12.2018', and 'To: 22.01.2019'. The 'Overview' section shows 'Overall data'.

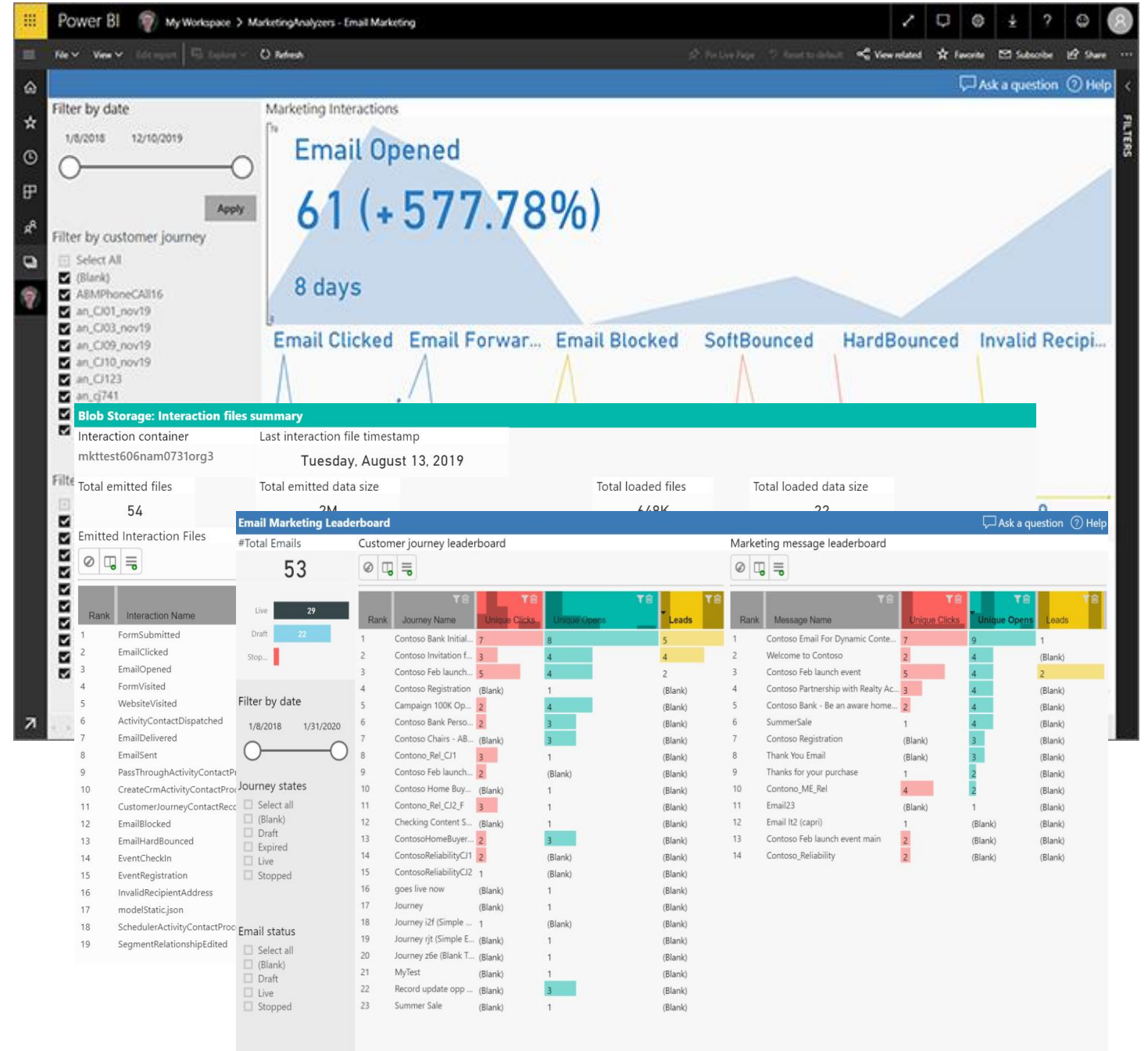
The bottom screenshot shows the 'Verna Kennedy' contact insights page. It also has a navigation bar with 'Summary', 'Details', 'Insights', 'Events attended', and 'Related'. The 'Insights' tab is active, displaying filters for 'From: 22.12.2018' and 'To: 22.01.2019'. The 'Email interactions' section is highlighted, showing a timeline of 'Email clicked' events. A red box highlights the 'Email clicked' event, which includes a tooltip explaining that it represents the total count of all link clicks in the message.

Reporting

Power BI

- **Profile Data** from D365 Marketing
- **Interaction Data** from customer owned Azure Blob Storage

<https://powerbi.dynamicsmarketing.org/>



Data Protection - GDPR

What is Data Protection?

What is the GDPR?

What are the principles of data protection?

What are the rights of data subjects?

What are the obligations of data controllers?

GDPR

Using Dynamics 365 Marketing **does not** provide compliance automatically.
It **helps** customers to comply with it

Learn more about GDPR

(<https://docs.microsoft.com/en-us/dynamics365/marketing/gdpr>)

Prepare Dynamics 365 for GDPR compliance

Enable & Configure GDPR features in Dynamics 365 Marketing



GDPR features

View and set the consent level for each contact



Data protection	
Consent given	(1) Consent
Is a child	No
Parent or custodian	---

Field	Value
Phone	Allow
Fax	Allow
Mail	Allow
Pre-fill marketing form	Do Not Allow

Minimum consent for Customer Journey & Lead Scoring



Include a consent selector in a subscription center



Double opt-in to confirm changes in consent level & subscriptions



Handle "Get my data", "Forget me" "Update My Data" requests



General	
Name	Journey rg8 (Simple Email Journey)
Owner	Pia Petersen
Status	Active
Status reason	Draft
Type	Automated
Minimum Consent	--Select-- (1) Consent (2) Transactional (3) Subscriptions (4) Marketing (5) Profiling
Start date and time	
End date and time	
Time zone	(GMT+01:00) Brussels, Copenhagen, M...

Timeline	
This record hasn't been created yet. To view this record, save it to your timeline.	

Purpose	
Purpose	Email marketing
Description	Set up a quick email blast.

Is recurring	
Is recurring	No
Suppression segment	---

Resources

Dynamics 365 for Marketing – Useful Resources

- [Overview](#)
- [Developer Guide](#)
- [User Guide](#)
- [Admin Guide](#)
- [Power BI Analytics](#)
- [Ideas/Feature Requests](#)
- [Known Issues](#)
- [GDPR Guidance](#)
- [2019 release wave 2](#)

Dynamics 365 for Marketing – Useful Resources

- [Deploy/Transfer Data](#)
- [Deploy/Transfer Customizations](#)

Thank you!