Real-time marketing transition playbook

Complete a move across marketing engines

Last updated on: October 17, 2023

Microsoft

Kindly note

Investment

All future investments of D365 Marketing are already going into Real-time Marketing only.

Transition

Our recommendation is to do incremental transition without interrupting the ongoing outbound marketing rather clear-cut transition.

Think real time

During transition THINK REAL TIME to improve in the processes when targeting moments that matter over batch communications.

Change management

Strong change management to support the team to adopt new way of doing marketing smoothly is needed for already deployed Outbound Marketing implementations.

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Purpose and scope

THE SITUATION

The Real-time marketing module in Dynamics 365 was launched in 2021, and features supporting it have been in rapid development ever since.

We have now reached a point where the majority of the widely used scenarios of Outbound marketing can be achieved in the Real-time marketing module.

Customers who are currently using Outbound marketing now have the opportunity to transition these scenarios to the D365 Real-time marketing module.

This guide provides information on the transition path from Outbound to Real-time marketing and highlights 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
- ✓ Get a functional comparison between Outbound and Real-time marketing
- ✓ Develop a strategy for transition
- ✓ Understand the items and techniques needed for transitioning

INSIDE THIS PLAYBOOK:

Chapter 1 Introduction	Chapter 2 Explore	Chapter 3 Transition
Ensure functional cover for the transition	Detail the transition for each feature in the scope	Plan and execute

Chapter 1
Introduction

Understand functionality cover of Real-time marketing(RTM)

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 Real-time 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(OBM) 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 artifacts

- 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

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Chapter 1: Introduction

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Leveraging a data driven approach requires new tools…

Marketer shift in strategy

Yesterday	Tomorrow
Gut decisions	Audience of one
Big bang campaigns	Moments-based marketing
Message bombarding	Channel optimizations
One-size-fits-all	Audience of 1
Siloed experiences	Seamless experience
Demand generation	Build loyalty and lifetime value

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Real-time marketing empowers marketers to create engaging experiences

Understand customers & personalize experiences
Analyze large amount of data to get a 360 profile of your customer and personalize every interaction

Trigger-based journey
React to customers' actions in real time, start journey based on custom triggers or Dataverse change.

Segment-based journeys
Target the right audience for each campaign with the easy-to-use segment builder

AI-powered content idea & segment
Leverage Copilot and AI innovation to deliver compelling and personalized experiences within minutes

Email Marketing
Send personalized and engaging emails to reach your audience

SMS, Push Notifications & Custom channels
Leverage out of the box text messages, push notifications, and custom channels

Marketing Forms
Easily create and publish forms to collect data about your customers and capture leads

Channel optimization
Leverage AI to pick the best channel for each customer at every step in their customer journey

Lead generation & Management
Identify, nurture and handoff leads to the sales team to accelerate your pipeline

Analytics & Insights
Understand and optimize how marketing mix efforts are contributing towards key business outcomes

Events organization
Organize compelling physical and digital live event worldwide to reach your customers

Business Units, Consent & Brand profiles
Organize digital assets, set preference centers and create brand profile to match your business needs

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Outbound vs Real-time marketing

Key capabilities

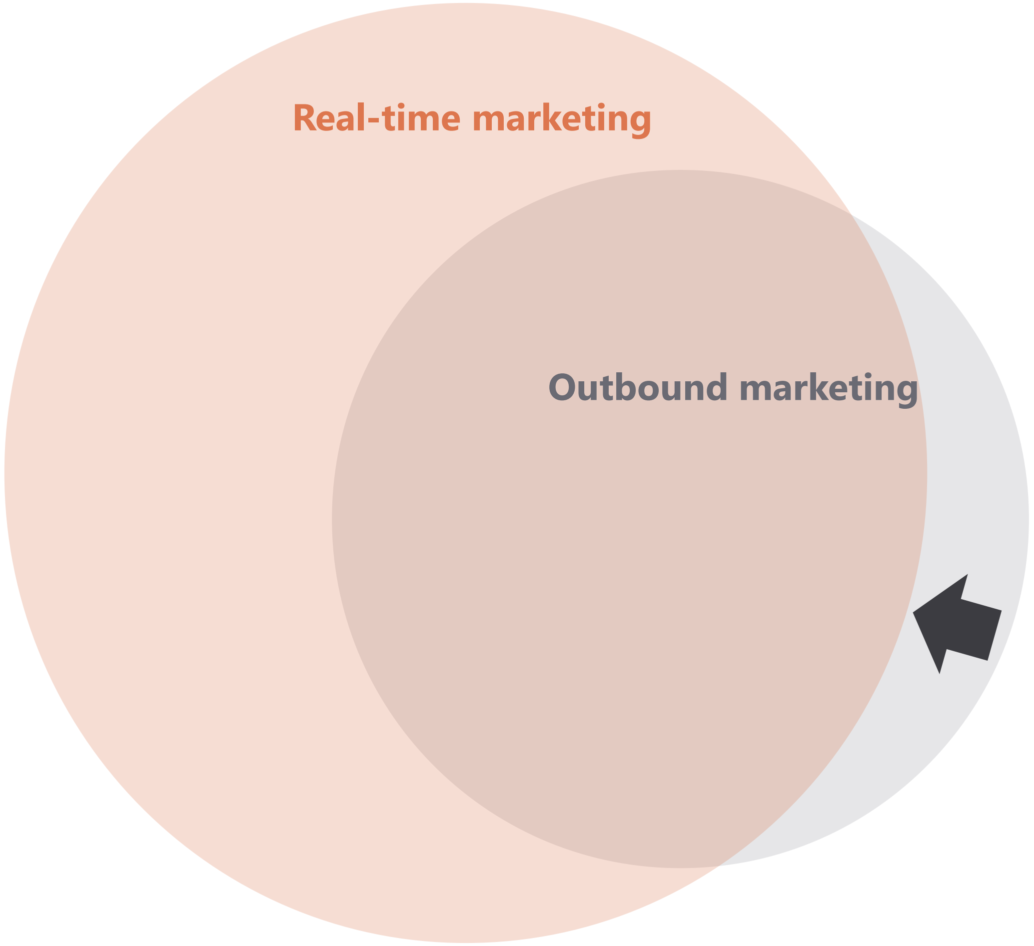
Real-time marketing only:

- Real-time journey orchestration
- **300M interactions/month**
- **Continuous and seamless integration with Customer Insights**
- Custom triggers
- Trigger on change to Dataverse
- Orchestrate to leads
- Power Automate integration
- New segmentation editor
- **No limits on # of segments**
- Conditional content UI (no code)
- **AI-powered channel optimization & content ideas**
- Modern Business Units, Brand profiles
- Text (SMS) messaging
- Push messaging
- **Full fidelity custom channels**
- Modern forms editor
- Copy of email on unified Dynamics timeline
- Frequency caps
- UTM Tagging
- Forms
- Enhanced consent and preference centers
- Lead Scoring

Outbound marketing features coming to RTM:

- B2B capabilities, Double opted-in, Custom reporting*

*This capability will be in public preview and/or generally available in Real-time marketing within the 2023 release wave 2, October 1, 2023 – March 31, 2024.



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Outbound vs Real-time marketing

	Outbound marketing	Real-time marketing
Segment Based Journeys	Natural Language segment creation	Enhanced natural language segment creation
	Integration with Dynamics 365 Customer Insights	✓ Native integration with Dynamics 365 Customer Insights
	Market to Contacts	✓ Market to Leads, Contacts, Customer Insight Profiles
Trigger Based Journeys	X	✓ Custom triggers
	X	✓ Trigger on Dataverse record change
	X	✓ Branching journeys
	X	✓ Journey reminders
Channels	Email designer	Enhanced email designer (Content Block, AI-powered Content idea, Send Now ......)
	Marketing pages	Integrated via Power pages
	Web forms	Enhanced web form experience (create forms within minutes)
	X	✓ OOB - SMS & Push notification OOB channels
	Custom tile	✓ Custom channels with OOB functionalities
	Social posts	X
Personalization	X	✓ AI-powered channel optimization
	Dynamic text	Dynamic text
	Code-based personalization	✓ Enhanced Code-free personalization
	X	✓ Conditional Content
Consent	Contact-Based	✓ Contact Point based, granular per touchpoint
	Subscription List	✓ Opt-in topics
	Support BU scoping in Segment and Journey	✓ Support BU Scoping for segments, journeys, emails, forms.
Business organization	X	✓ Brand Profiles
	X	✓ Modernized Business Unit and Brand asset organization
Connected Sales & Marketing	Lead Scoring	Enhanced Lead Scoring Builder
	Shared Customer Timeline	Shared Customer Timeline
	X	✓ Assign a task to sales directly within journeys
	X	**ROADMAP** - Shared OOB B2B Dashboards
Analytics	In-App Analytics in Contacts, Emails and Journeys	In-App Analytics in Contacts, Leads, Emails and Journeys
	X	✓ Dashboard Analytics
	Export to blob storage	**ROADMAP** -Fabric Integration for custom reporting and export

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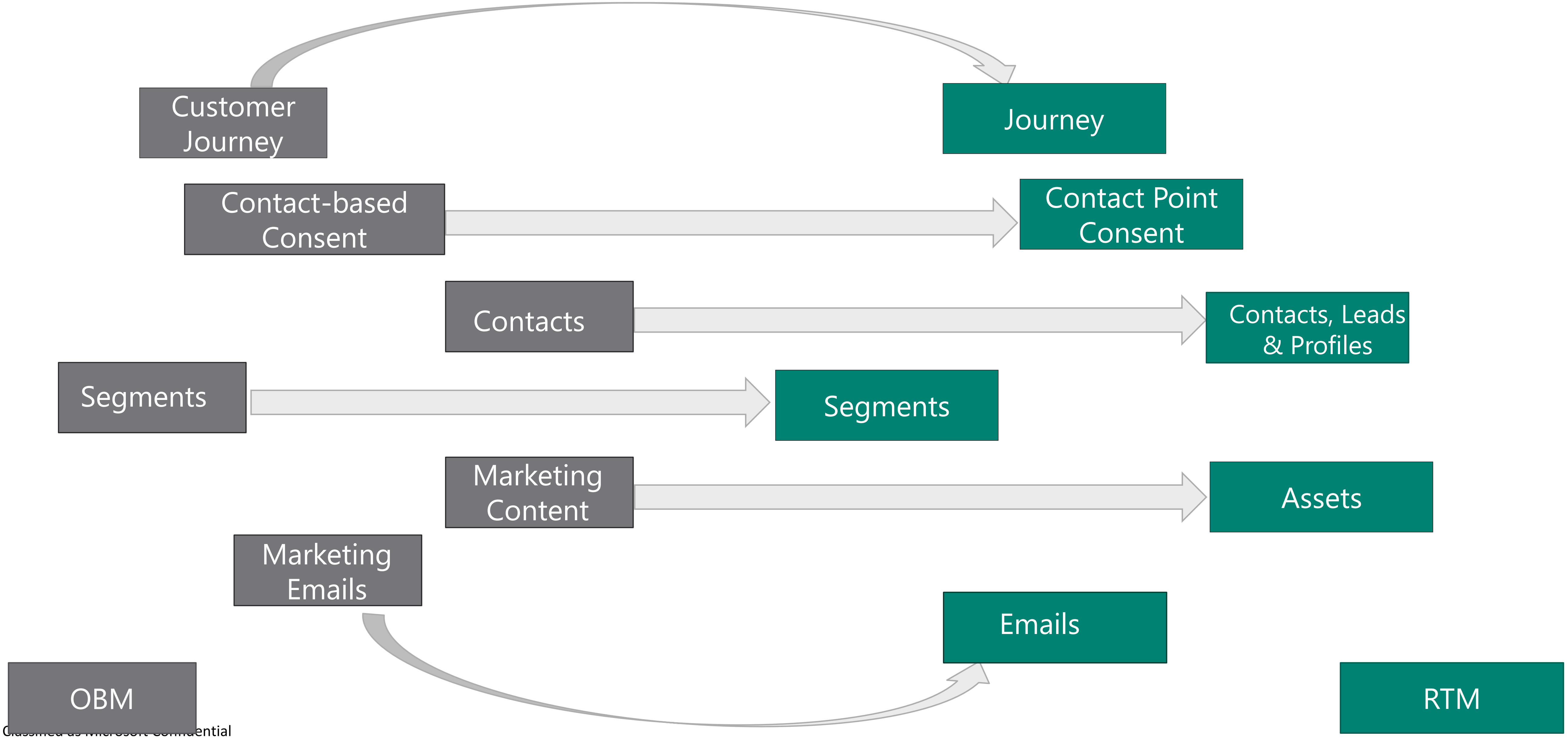
Understand the equivalent feature areas



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

Key Advantages of RTM

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

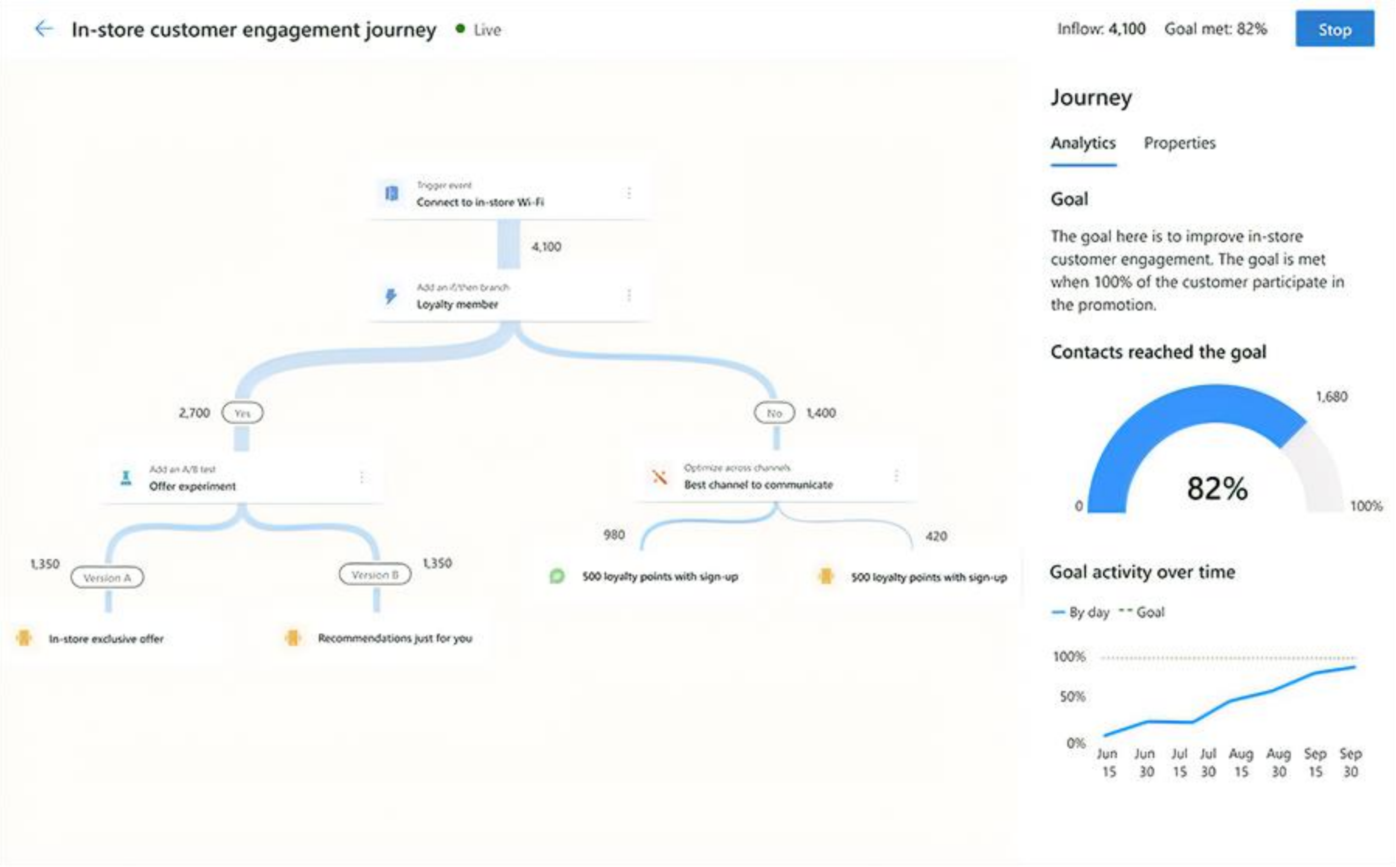
- Support to quickly convey offers, messages, or other information directly to users of your app

AI driven email creation and channel optimization

- Connect with customers on the channels they use the most by AI model
- The AI-powered content ideas feature helps you kickstart email creation

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



What is new and different in RTM?

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

- Real Time Marketing
- Outbound Marketing

Journeys
- Multibranch journeys & reminders
- Communication frequency management
- Real-time triggers from Dataverse or external system
- Real-time journeys to Contacts, Leads or CI Profiles
- Segment-based journey to Contacts

Segmentation
- Native integration with Dynamics 365 Customer Insights
- Set refresh frequency of a segment
- Contacts, Leads, Opportunities, and Accounts
- No limits on dynamics & static segments
- Advanced real-time segmentation
- Natural language segment creation
- Market to Contacts

Channels
- Personalized SMS through any provider
- Personalized Push Notifications
- Marketing forms
- Custom Channels
- Email
- Event Management
- Social Posts

Email Personalization
- AI-powered channel optimization
- Conditional Content
- Easy to use, code-free personalization
- AI generated Content Idea
- Code-based personalization

Lead management
- 360 customer view across Sales & Marketing
- Sales Orchestration
- Real Time Lead Scoring
- Lead Scoring
- Lead and Contact Capture

Consent
- BU & Brands management
- Opt-in topics
- Contact Point based, granular per touchpoint
- Subscription List
- Contact-Based

Business organization
- Brand asset organization
- Modernized Business Units
- Brand Profiles
- Approvals

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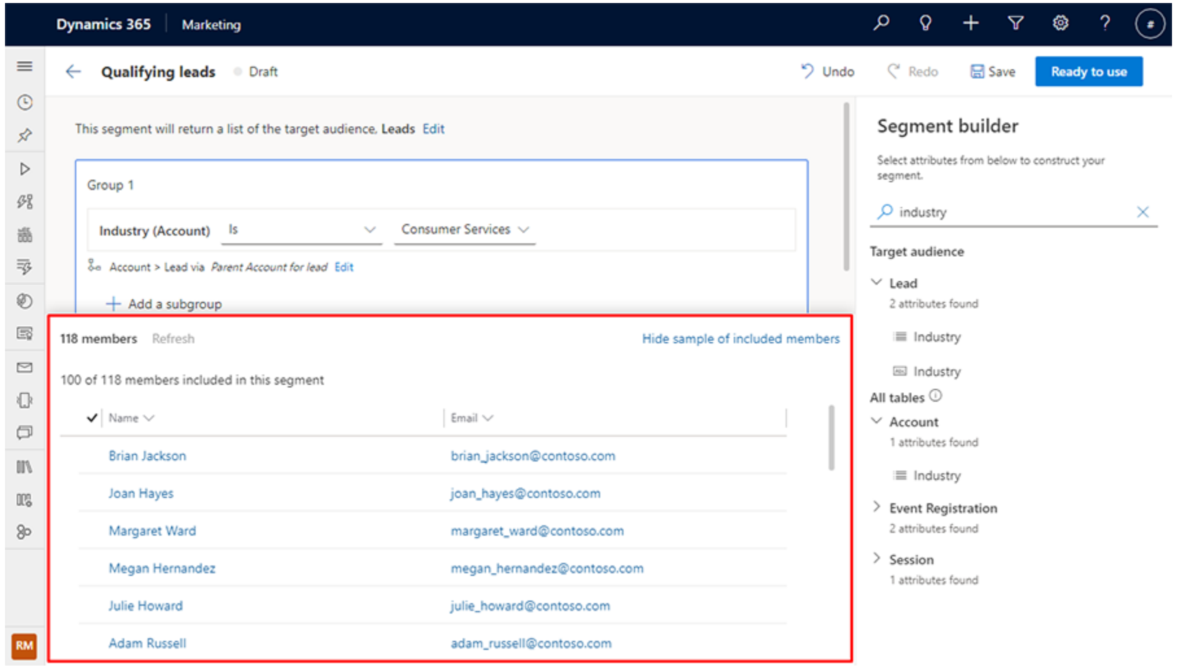
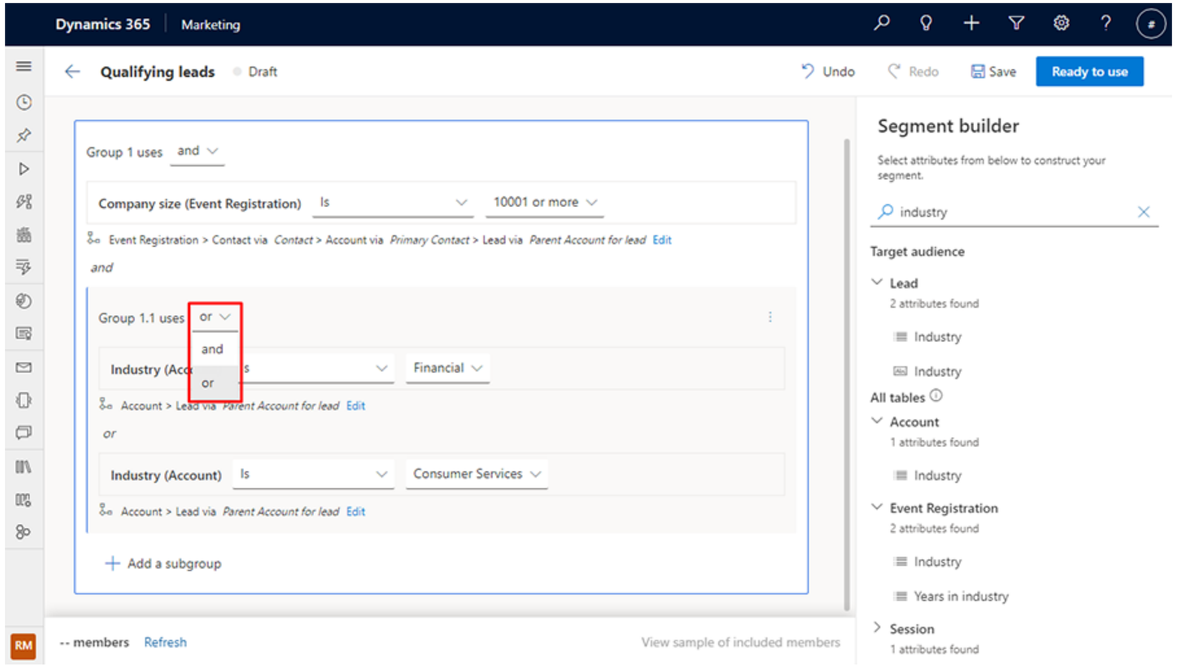
Enhanced segments in RTM

- Real-time marketing can use segments directly from outbound marketing and Customer Insights
- No limits on dynamics & static segments
- 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
  - Individually add members to segment to be included or excluded
  - 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.
- You can use natural language to create segments
- You can use customer interaction data to build your segments
- You can now create segments with data tables, such as Marketing Lists, that have N:N relationships with target entities like Leads and Contacts





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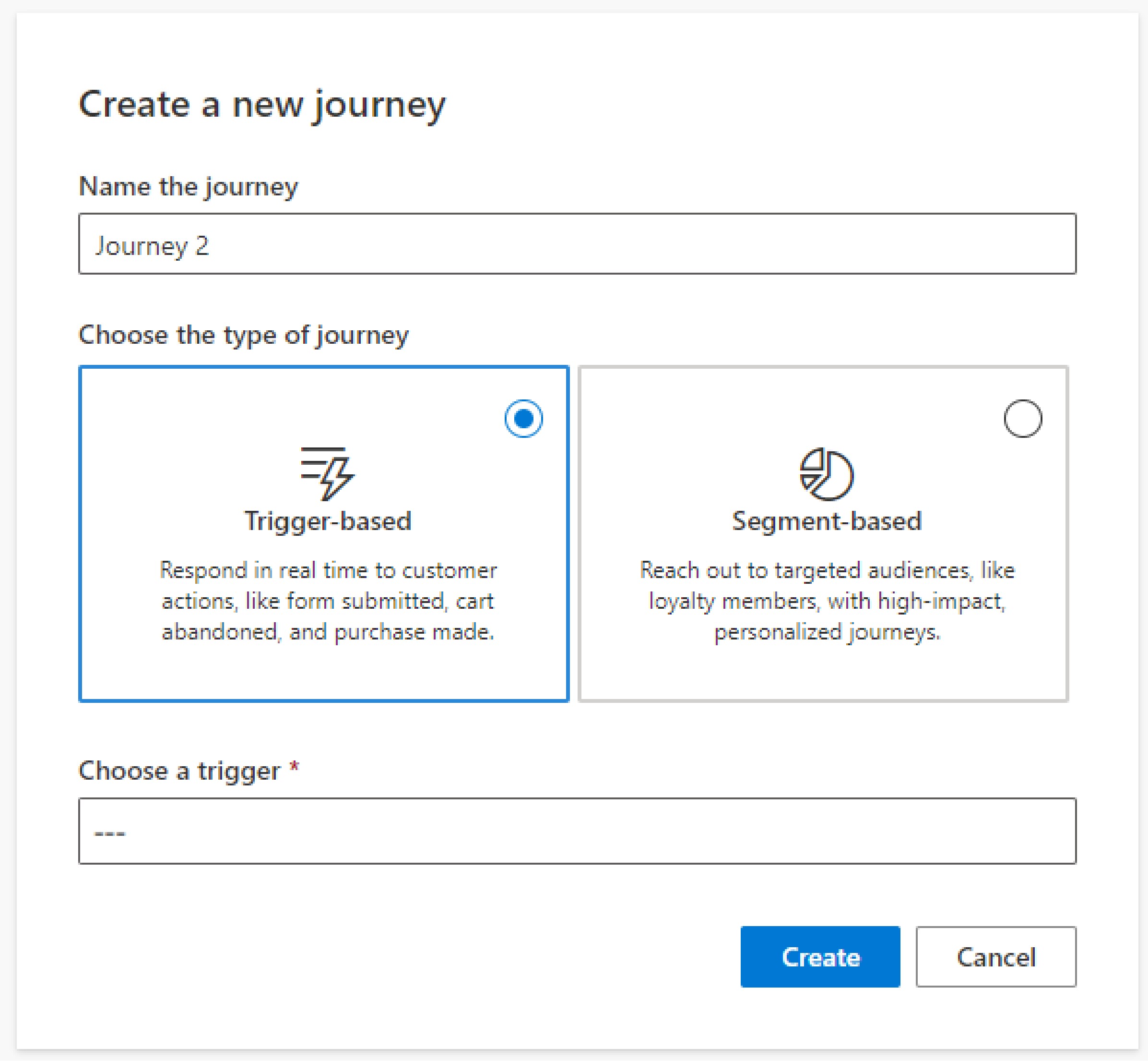
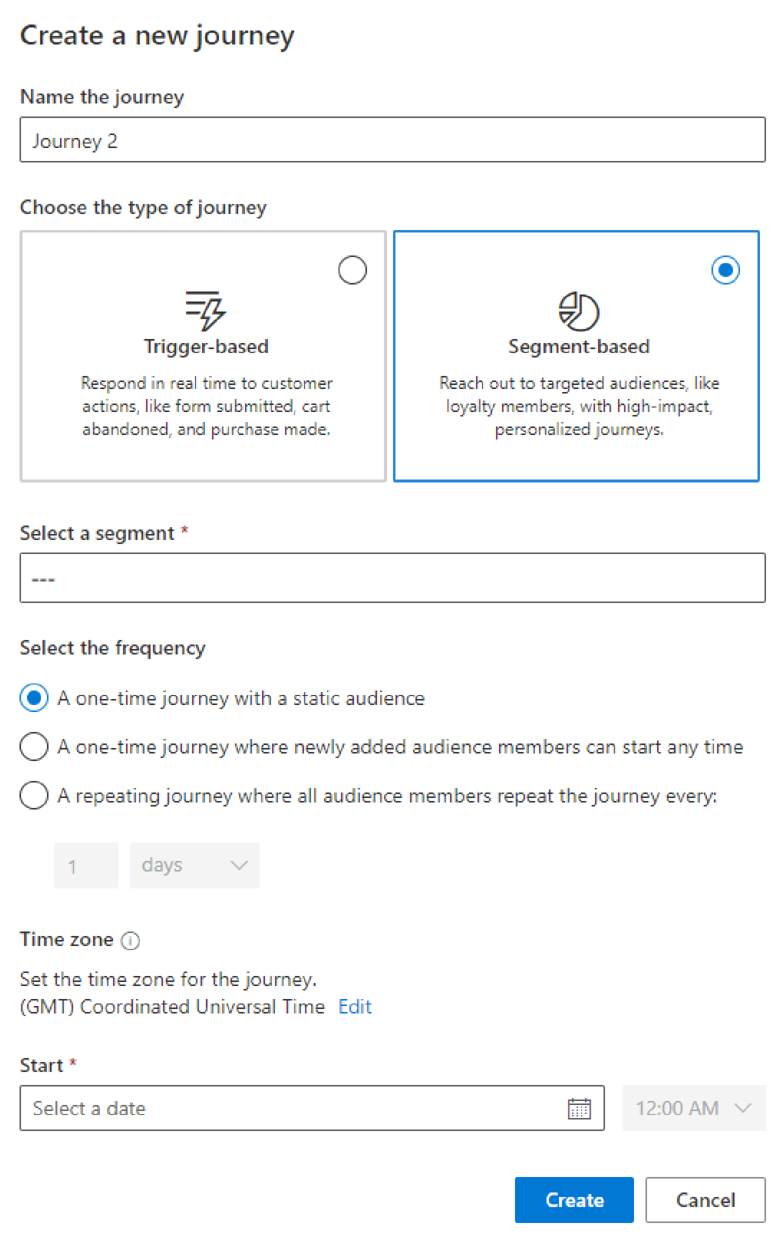
React to customers' action in real time

- 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 further define the journey entry/exit criteria from the data attributes from the trigger.
- 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.



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.



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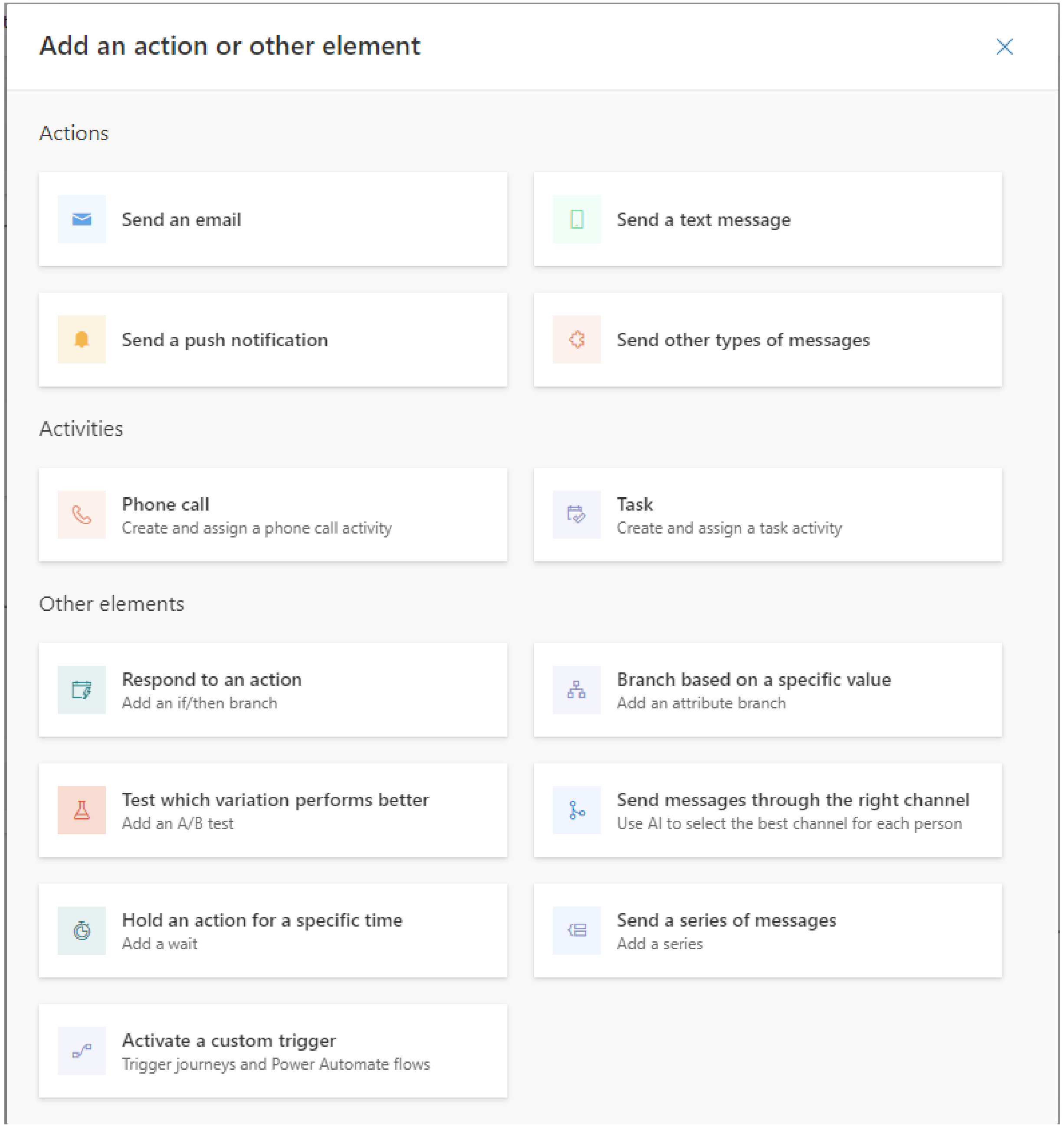
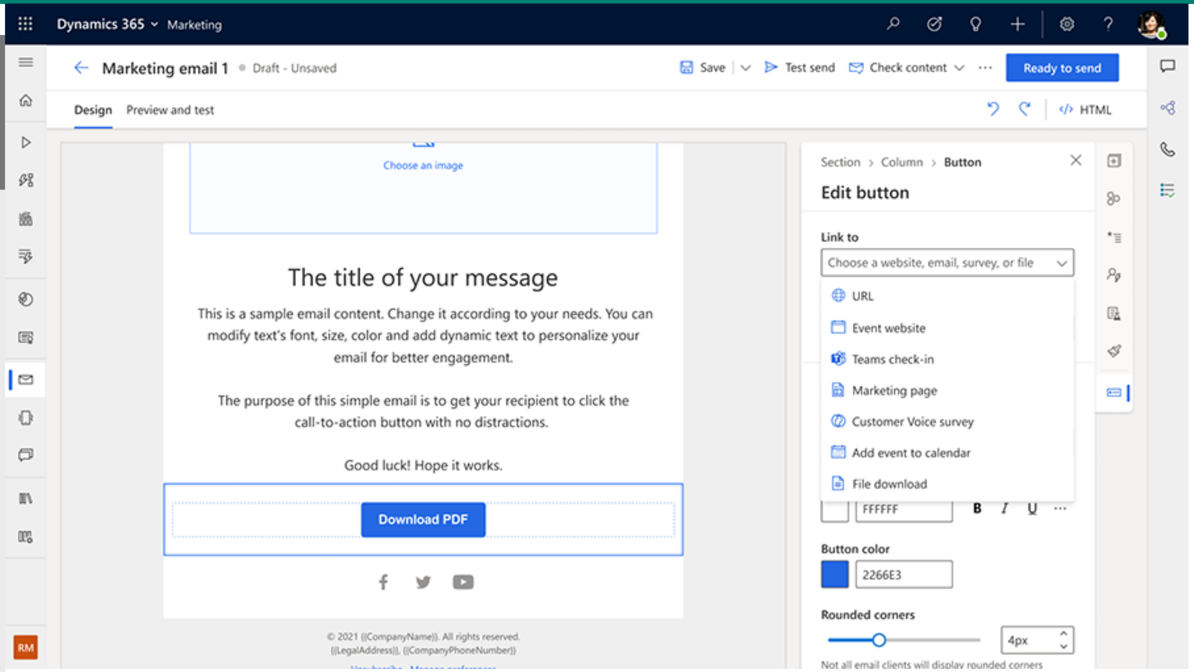
Enhanced features in RTM journey designer

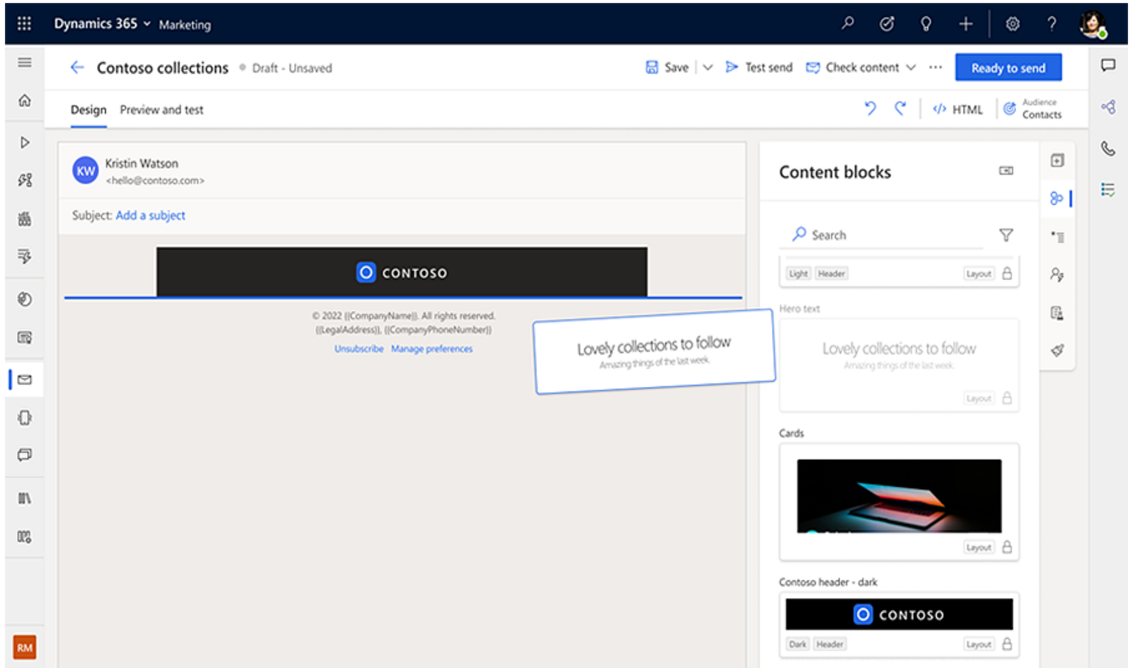
- Push Notifications, SMS and Custom as an additional channels for engagement
- Now, you can create more than two branches at any given step in the journey, creating more fine-grained personalization and engaging each customer differently based on their unique profile and behavioral signals.
- You can 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.
- You can now create journeys that nudge and remind a customer to take a required action.
- you can now create sales activities such as tasks and phone calls directly from journeys



Key differences in functionality

- AI-driven content ideas to kickstart email creation*
- 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.
- You can now add up to five additional recipients to emails in the cc field
- You can now easily reference a copy of previously sent emails in the interaction timeline
- Enhanced “Send now” - send to entire segment & create reusable journeys
- Easily setup conditions using simple to use condition builder to test segment membership, attributes, and related tables without any scripting
- Brand Profile support





* Preview: Use AI to kickstart email creation with content ideas (Dynamics 365 Marketing) | Microsoft Learn

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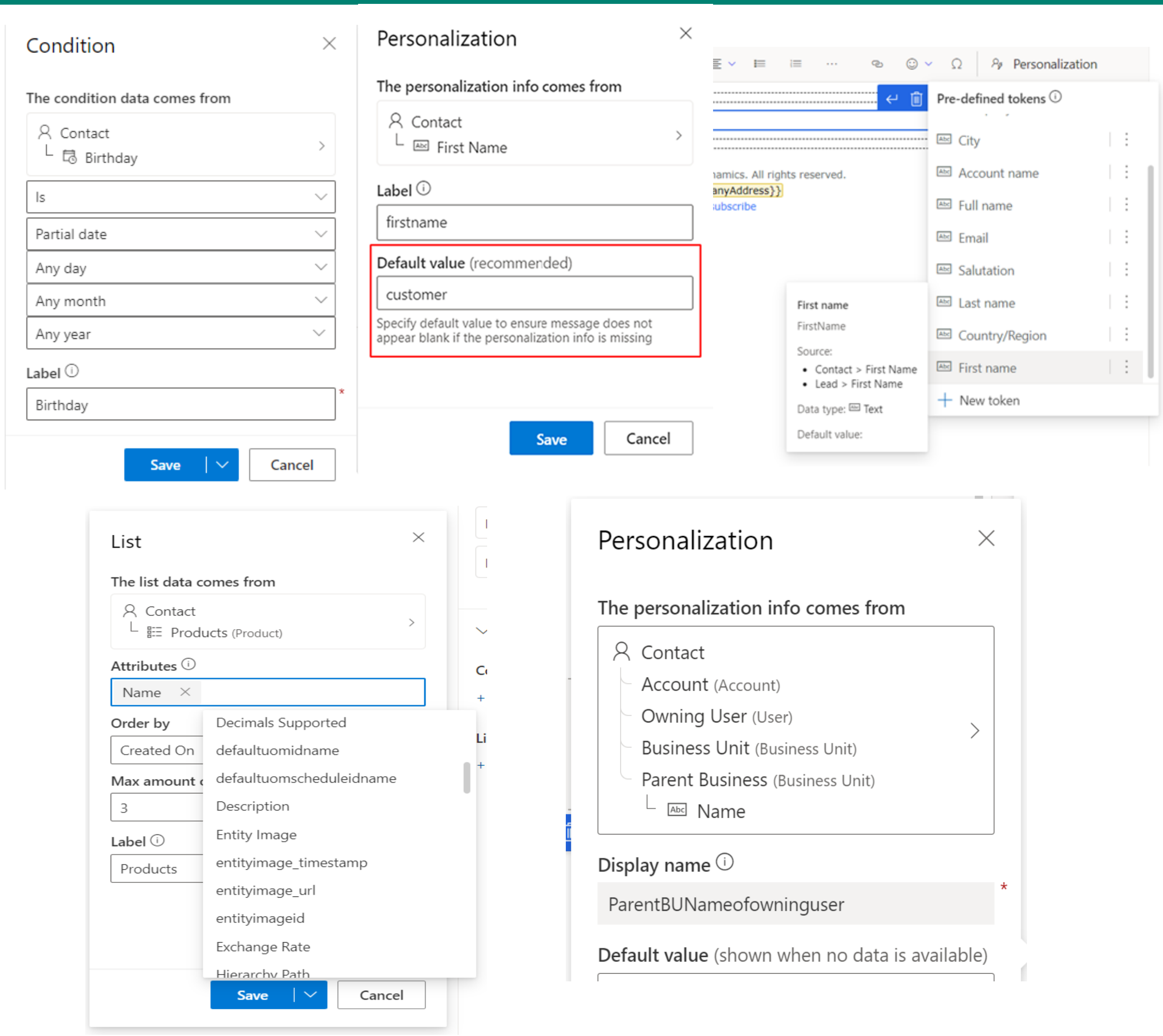
Key difference in functionality

- 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 won 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
- You can further filter down your list in your email.
- You can now personalized content using data with one-to-many relationships.



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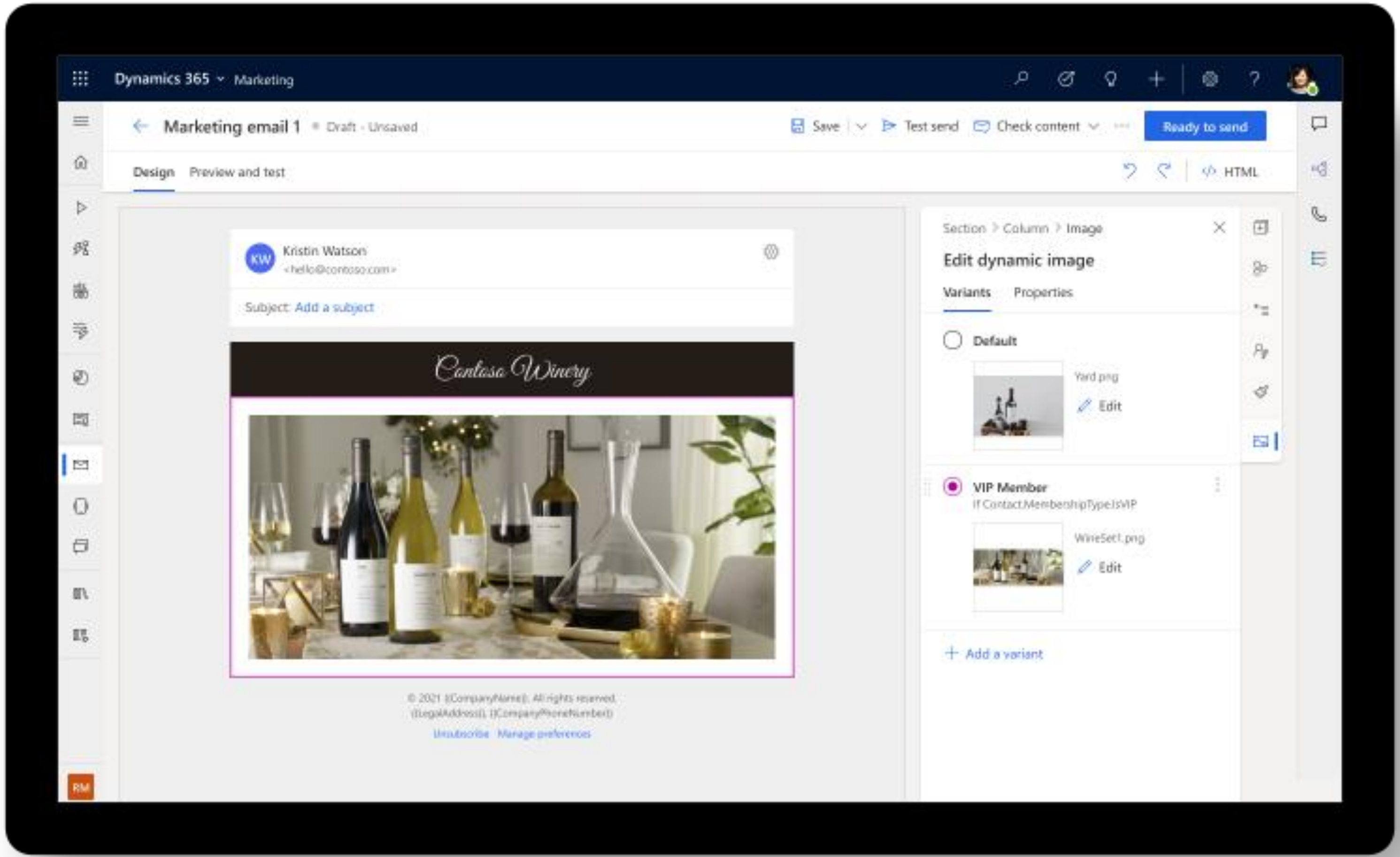
Key difference in functionality

- Conditional content is an easy way to deliver effective and engaging personalize 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



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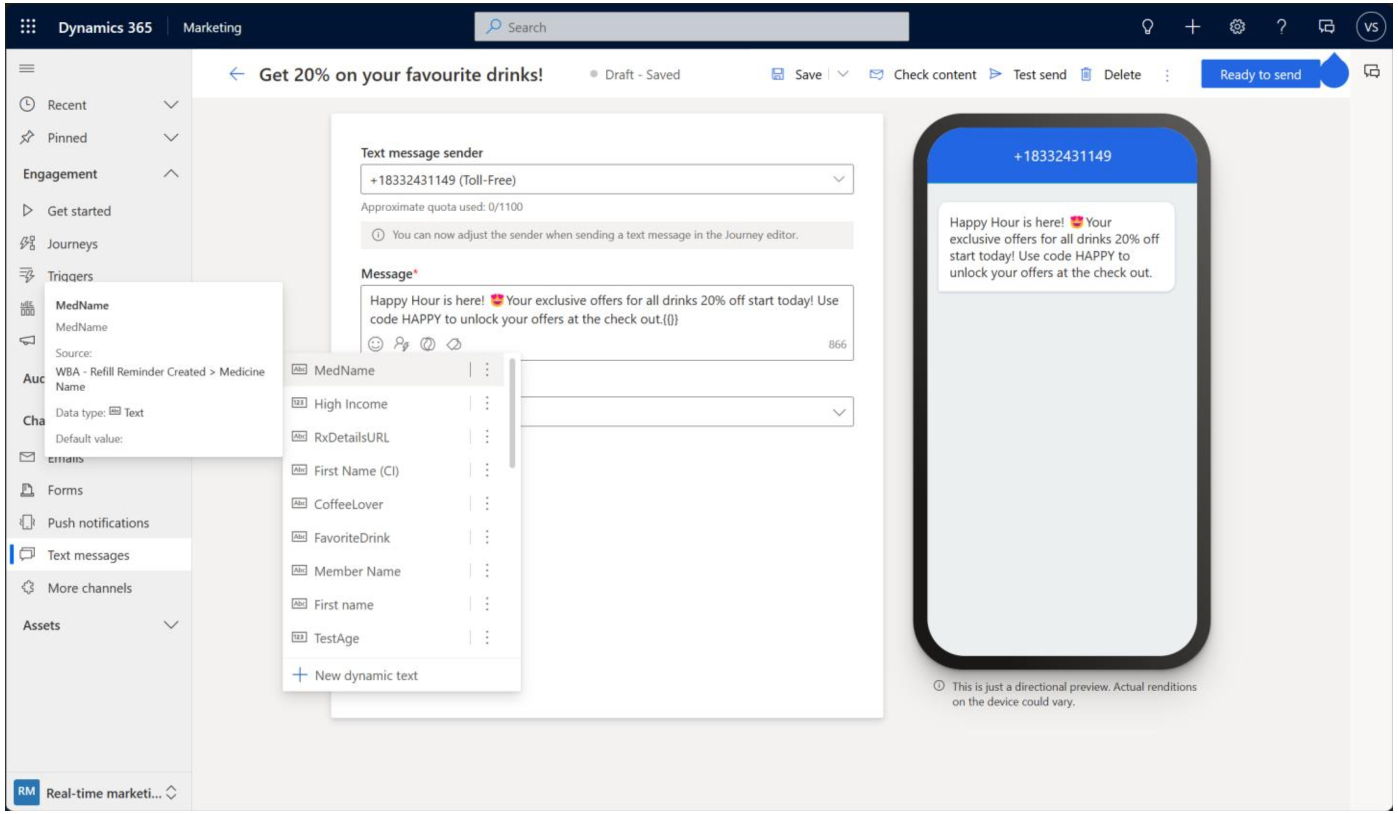
Key functionality

- 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 orchestrate beautiful, personalized push notifications with images to increase customer engagement
- You can add Customer Voice survey to a push notification
- You can track push notification messaging matrices from channel insights
- You can add images to notifications, making them more engaging.



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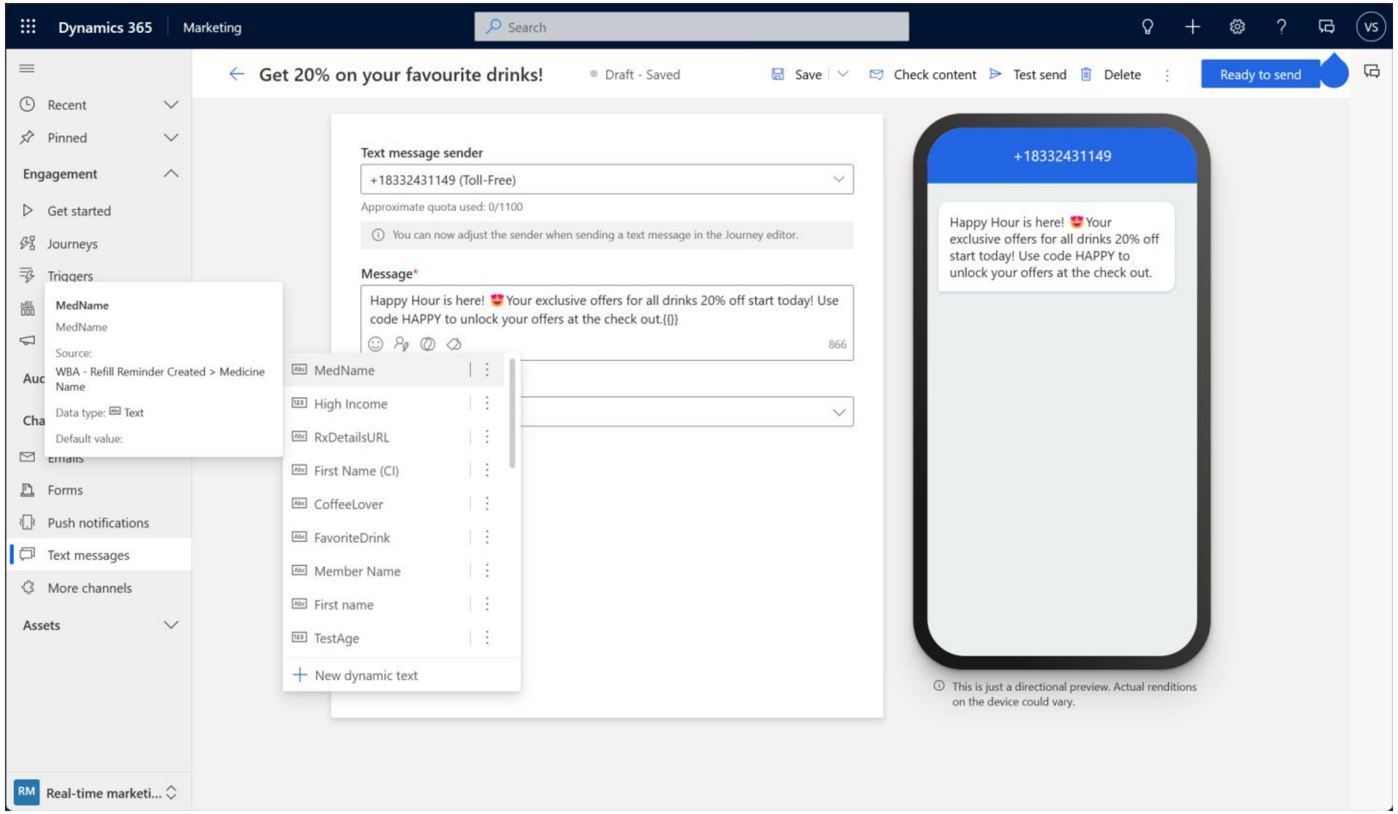
Key functionality

- RTM support two-way text messages natively.
- Native SMS supports(Infobip, LINK Mobility, Twilio, TeleSign, Azure Communication Services preview)
- Any additional SMS provider can be supported through custom channels and benefit from the native built-in functionality (SMS editor, analytics, inbound SMS)
- Custom channel to connect through the specific communication channels you are familiar with



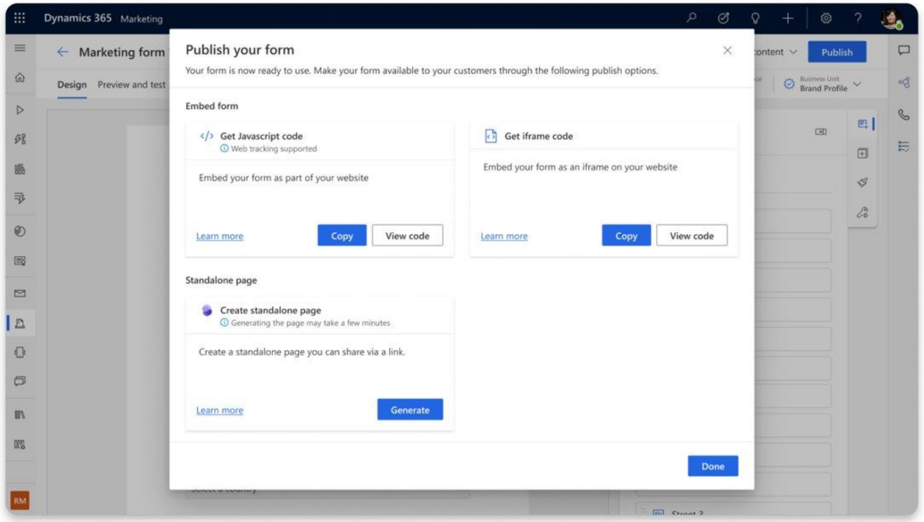
Key functionality

- Easy build & publish experience
- Native part of Real-time journeys
- Leverage the new Real-time marketing consent model
- All entity attributes, including custom, are available as fields to be used in a form without further configuration
- Improved end user experience for live forms
- Easily publish your form as a standalone page
- Generate the form embedding code snippet with one action which can be used in CMS or Power Pages
- Form load time is significantly reduced for the page visitor thanks to Content Delivery Network (CDN)
- You can easily customize form entity to suite your own needs

3 Clicks **50%** Less time to create & publish a form

AFTER

Easy publishing of forms as a standalone page



Steps to get a standalone page:

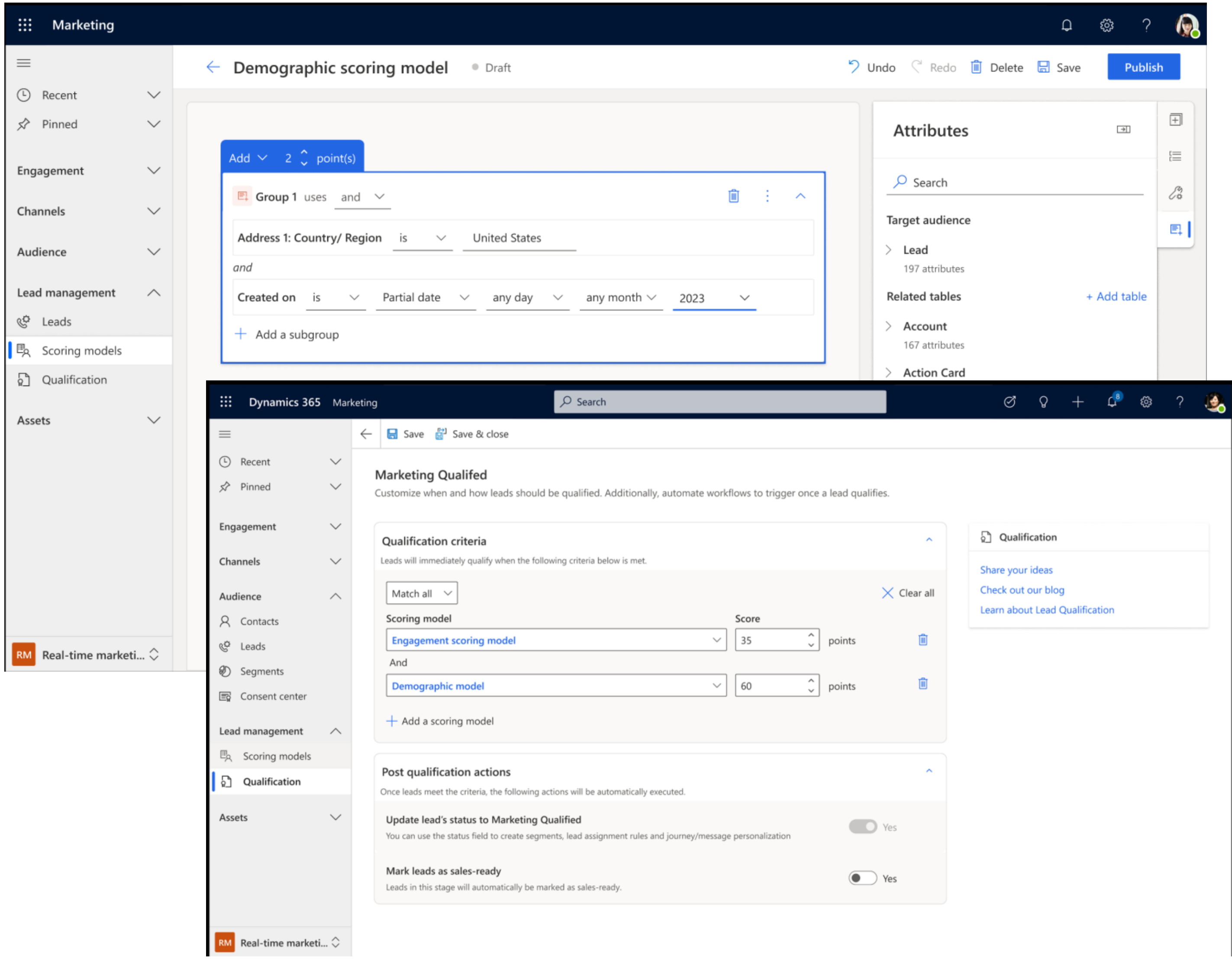
1. Publish
2. Generate
3. Copy URL

Publish Generate Copy

We went from 17 clicks to 3, and 11 screens to 1!

Key functionality

- More sophisticated qualification criteria by mixing scoring models - soon even directly qualifying by adding high value actions or attributes (example: requested a demo -> qualify)
- Create scoring models based on demographic and behavioral conditions
- Target an audience
- Consistent experience with other features (e.g., Segmentation)
- Fundamental insights provided OOB
- Handoff qualified leads to the sales team at the right time
- Flexible separated feature for qualification that allows more sophisticated methods (and just the starting point!)
- Cannot target accounts
- Not consent aware



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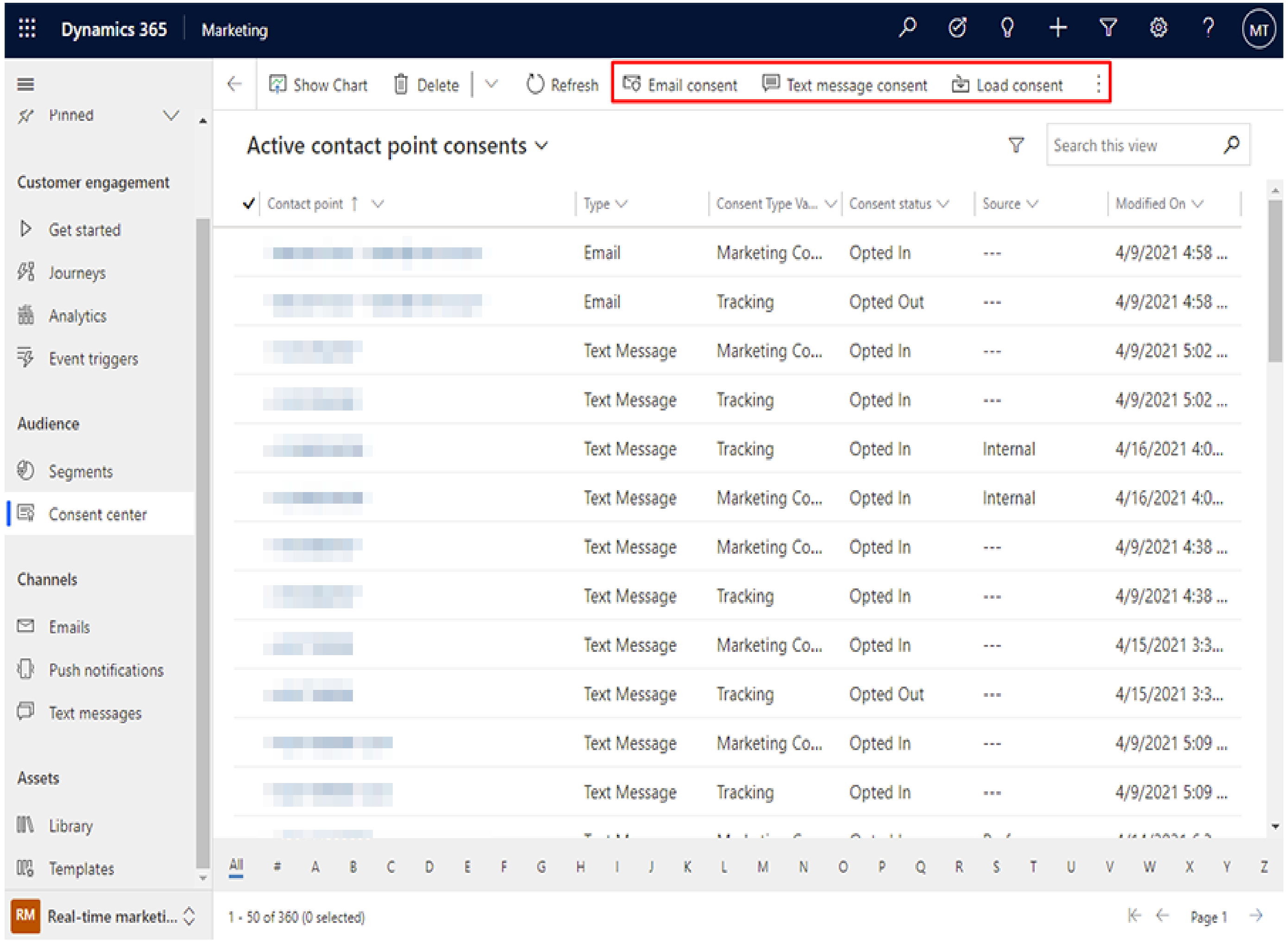
Key differences in functionality

- Consent is managed at the contact point, allowing customers to decide how they want to receive communications. For example, send Daily Deals to jane@outlook.com, but Product Updates to +1-412-555-1212.
- Support for all entity types: contact, leads, Customer Insights profiles.
- Multiple, brand-specific preference centers gather consent independently and set enforcement for each brand, line of business or geography.
- Tailor communication to the specific topics your customers want to receive, reducing full unsubscribes.
- Customers who already have 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.
- Load Consent now support loading OBM subscription list to RTM contact point consent.



Chapter 2: Explore

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Adopting Real-time is easy

Adopt over time → gain confidence, no surprises

Start to set new journeys in Real-time

Upgrade your running outbound journeys in real-time

Consider the benefit to reach customers in moments that matters

Leverage the new and easy send now feature	Market to leads, contacts, and customer insights profiles	Rethink your segment journey into trigger Journeys	Create deeply engaging emails with personalization features and AI-driven content	Leverage the OOB text messages and push notifications, to send personalized messages	Generate pipeline by handing over leads to the sales team at the right moment	Set consent centers, brand profiles, and organize assets to meet your business needs

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Consider the evolution of your journeys

- 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 moments that matter 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 journeys transition to RTM, consider which segment-based communications are better served as triggered based communications.

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Pilot the transition

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.

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.

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

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

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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 journeys 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

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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:	How it works in RTM:
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.	Segments created in OBM can still be used. Enhanced segments in RTM is allows to build static and dynamic segments which can be accessed by navigating to RTM → Audience → Segments inside the D365 Marketing app. RTM segment supports to build multiple groups, query and behavior data to build 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, for transition completeness perspective we recommend you move OBM Segment to RTM for journeys you are planning to transition to RTM.

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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:	How it works in RTM:
N/A	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

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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:	How it works in RTM:
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.	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. A/B test: A/B tests allow you to measure which channel or content messaging strategy leads to higher success. 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. Dataverse Record Creation: Can create Phone Calls, Tasks, Leads and Opportunities at the right stages to enable sales engagement from a Journey.

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Journey Automation

Migration Path:

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

1. Consider transition to trigger-based journeys
2. Create journeys with the same journey 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.

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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.

How it works in OBM:

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 OBM.

In OOB to create or review emails go to OBM → Marketing Execution → Marketing Emails → New Email.

Personalization limited to use of entities one-hop away from contact

How it works in RTM:

In addition to the standard email editor features, the RTM email editor includes unique personalization capabilities and AI-driven content idea and image suggestions.

Please see here and here the powerful email personalization and content idea generation available in RTM.

In RTM to create or review emails go to RTM → Channels → Emails → New Email.

Can include personalization using entities several hops away from contact or lead.

Migration Path:

Emails created in Outbound Marketing can be imported easily to RTM using the Import Email feature available in RTM Email section.

1. Step by step instruction on how to transition OBM Emails and Templates.

Please Note: The import email feature will require user review of some dynamic content like:

- Code element content
- QR code
- Survey references
- Content settings

Currently there is no way of identifying which OBM Emails and Templets are imported into RTM. If you import OBM Emails and Templates again then Import Tool will create new Emails and Templates records in RTM with same name.

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 for Trigger-based Journeys
  - It now supports scenarios that allow customers to go through the journey multiple times.

- Segment-based Journeys in RTM can be enabled for email deduplication as a feature switch. This will be applied to all segment-based journeys. For more details on how to enable this feature and on its limitations refer to Preview: Prevent sending emails to duplicated email addresses - Dynamics 365 Customer Insights | Microsoft Learn

- If your organization has both scenarios where some journeys require email deduplication and others do not, you can consider using the frequency cap feature in this kind of scenario, which will let you set a limit on the number of messages your customers receive in a given amount of time through a particular channel while leaving the email deduplication option turned off.

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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:	How it works in RTM:
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.	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 block created in Outbound Marketing can now be imported easily to RTM using the Import content blocks feature available in RTM Content blocks section.

1. Step by step instruction on how to transition OBM Content blocks.

Please Note: The Import content blocks feature now is not importing some dynamics text like:

- Code element content
- QR code
- Survey references
- Content settings

Currently there is no way of identifying which OBM Content blocks are imported into RTM. If you import OBM content blocks again then Import Tool will create new Content blocks records in RTM with same name.

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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:	How it works in RTM:
OBM include an image and videos library feature which can be accessed by navigating to OBM → Marketing Content inside the D365 Marketing app.	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 uses the same unified asset library as OBM.

Migration Path:

1. As OBM and RTM use the same asset library, there isn't anything you have to action for migration.

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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:	How it works in RTM:
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. Implementation details will vary based on provider of custom tile	Outbound text messages is native channel in RTM. RTM natively supports Azure Communication Services preview, Infobip, LINK Mobility, Twilio, or TeleSign SMS providers. Customer can setup custom channel to configure third party SMS provider or any type of communication channel. SMS provider can be configured by navigating to Marketing →Settings →Customer engagement →SMS providers inside the D365 Marketing app Custom channel can be configured by navigating to Marketing →Settings →Customer engagement →Custom channels inside the D365 Marketing app Text messages can be configured by navigating to Marketing →RTM →Channels →Text messages inside the D365 Marketing app. Custom messages can be configured by navigating to Marketing →RTM →Channels →More channels inside the D365 Marketing app.

Migration Path:

Text message records are not migrated and need to be 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

Any other type of custom channel should be recreated in the RTM along with its message templates.

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.

How it works in OBM:	How it works in RTM:
N/A	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.

Migration Path:

N/A

* Push notification currently doesn't support the sending of notifications to customer portals.

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Marketing Forms

A marketing form is an inbound communication channel that allows your customers to register for newsletters, ask for quotations, etc.

Marketing forms aim to effortlessly create smart forms to place on your websites and capture your customers' attention while allowing them to input their details to easily generate leads or tern leads into valuable customers.

How it works in OBM:

Step by step instruction on how to create Marketing forms and template.

How it works in RTM:

In RTM, Forms are currently used as landing page or in support of preference center forms and event registration forms.*

The main difference between real-time and outbound marketing forms is that real-time marketing forms now combine marketing forms and marketing pages, making the form output available to publish as stand alone. Refer this **link** for hosting options.

One consideration in the transition is that today, RTM forms can update only one entity (typically a Lead or Contact). Refer this link for more comparison of RTM and OBM form.

In RTM to create or review Marketing form go to Real-time journeys → Channels → Forms → New Form. Step-by-step instruction on how to create RTM form

Migration Path:

Marketing forms created in outbound marketing need to be recreated in the real-time marketing form designer to be used in real-time marketing.

1. Identify existing Page and Form Templates, Pages and Forms you wish to migrate from OBM to RTM
2. Go to RTM and recreate your Forms as per the original OBM Form Templates or Forms. As Forms no longer need to be in a Page to be published, Pages from OBM will not need to be recreated. The visual aspects of Marketing Pages should be added to the RTM Forms
3. Publish the Form by clicking Publish button and select the preferred hosting option

*** Please refer this page to look for further form type support in RTM Forms.**

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Consent Management

Subscription list lets you create groups of contacts based on their preference what type of bulk email they wanted to receive. RTM introduces Preferences Centers, allowing for a more granular consent management with Purposes and Topics.

For guidance on the differences of Consent management between OBM and RTM refer to link

How it works in OBM:	How it works in RTM:
Step by step instruction on how to create subscription list and maintain consent for bulk email in OBM.	RTM consent profile allows you to manage subscription list at different profile level. You can add multiple topics grouped by purposes under each compliance profile. Step by step instruction on how to setup topics in RTM. RTM consent center allows you to manage consent given by your customers for email, text messages and custom channels. Step by step instruction and blog on how to setup consent center in RTM.

Migration Path:

Prior to initiating the migration process, it's crucial to grasp the distinctions between OBM and RTM. Below is a specific guidelines based on your transition approach:

1. **Incremental Transition**: If you're adopting the "Incremental Transition" approach and running OBM and RTM journeys in parallel, continue to use OBM Subscription Centre in RTM Email.
2. **Full Transition**: If your transition approach is "Full Transition," and at the time of going live no OBM journeys are running, follow these steps:
   1. Migrate Content Settings to Brand Profiles for Address and social media links. Refer to this link for setup instructions.
   2. Migrate Subscription Centre to Preference Centre. Follow the link provided for setup guidance.
   3. Migrate Subscription lists to relevant Compliance Profile’s Topics and Subscription List Members to Consent Point Contacts. Learn how to migrate by referring to this link.
3. **Marketing to Leads**: Regardless of your transition approach, if you intend to market to Leads, it's essential to create and use the RTM Preference Center. Find more information in this link.
4. **Double Opt-in Process**: RTM does not include a double opt-in process by default, but it can utilize the double opt-in settings in OBM. Refer to this link for a step-by-step guide.
5. **Custom Consent in OBM**: Any custom consent built in OBM will require manual transition and follow a distinct migration path. If you're unsure about what to do, feel free to reach out to FastTrack or post a comment on the playbook blog for assistance.

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:	How it works today:
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	Events in RTM can be created as in OBM, with event data and RTM event registration form setup first, then an email communication plan setup in customer journeys. Step by Step guide. 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. Even registration Form no longer requires Power Pages and can be self-hosted or embedded in a website. It can still be hosted in Power Pages if required. New Features included in the Roadmap: - Power Pages with design studio (instead of Portals website, customizable with angular development)

Migration Path:

1. Real-time marketing contains a subset of outbound event management features plus several improvements. Please refer this page to know when to use OBM Vs RTM Event.
2. Identify existing/new Event Template and Event you wish to migrate from OBM to RTM
3. Recreate existing OBM Event, Event Template, Event registration form, Email content and customer journeys in RTM
4. Recommendation is to not transition any in-flight events but any new events should leverage RTM and the real-time triggered communications around registration

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Lead Scoring

To maximize return on investment from marketing activities, it's essential to identify the best prospects at the right moment. With Customer Insights - Journeys, you can use a new but powerful lead scoring builder to define your scoring criteria and model more efficiently. Details can be found in the documentation.

This feature allows you to seamlessly integrate your marketing and sales efforts, providing a more cohesive and streamlined experience for your leads and customers.

How it works in OBM:	How it works today:
All Leads need to have a Parent Account or Parent Contact to be scored. Scoring Models need to targeted to either Contacts or Accounts. Conditions and Actions are setup to calculate each Lead’s Score. Conditions based on Interactions will be stored at the Contact level. Grades are setup to define whether a Lead is Sales-ready.	Lead Scoring feature needs to be enabled by an administrator by going to Settings > Overview > Feature Switches and enabling the Lead Management feature switch. Once enabled Scoring Models can be created by going to Lead Management > Scoring Models. Leads do not need a Parent Account or Parent Contact, as interactions can be stored at the Lead level. Scoring Models can be built around attributes and interactions assigning a positive or negative score to each group of conditions. Grading is then setup to easily distinguish between good and poor leads. The feature is planned to expand to create Scoring Models on other Tables besides Leads.

Migration Path:

1. Identify which Score Models in OBM are to be migrated. Decide on whether some models can be merged as in RTM there is no requirement to define the target audience.
2. In OBM interactions are stored in the Contacts, so Parent Contact interactions will have to be considered when scoring when starting to use RTM Lead Scoring.

Copilot Features

Customer Insights – Journeys leverages Copilot to assist users on creating Emails, Segments and Journeys with AI assistance. Users will be able to deploy Journeys by using natural language.

How it works in OBM:	How it works today:
N/A	Journey Copilot allows for creation of a Journey with natural language. To enable it go to Settings > Overview > Feature switches > Journey > Copilot (preview). For more details and region and language limitations refer to link . Segment Query Assist can be used to create segments with natural language. For more details and limitations refer to link . Content Ideas Copilot will automatically generate ideas and recommend key points to assist in creating an email. For more details and how to turn it on refer to link . Copilot Theme Assistant is a feature that helps matching the style of an email or form to an existing website with the help of AI. For more details refer to link and link .

Migration Path:

N/A

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Analytics, Custom and OOB reports

Dynamics 365 Customer Insights - Journeys keeps track of the way your contacts react to your marketing initiatives and provides detailed analytical views to help you understand your impact and learn what works best.

How it works in OBM:	How it works today:
OBM provides OOB Insights reports tied to Contacts, Leads, Segments, etc. Marketing entities - Analyze results to gain insights from your marketing activities - Dynamics 365 Customer Insights | Microsoft Learn Additionally, to OOB reports customers are able to build custom reports with Power BI and use Template Gallery to have predefined reports for them to use.	RTM has equivalent OOB Insights reports Additionally, real-time journeys provides an aggregate set of dashboards for journey and channel analytics. Real-time journeys also includes a marketing effectiveness dashboard, which provides valuable information about different marketing assets and their campaign impact. New Features included in the Roadmap: - Build custom reports using Microsoft Fabric integration

Migration Path:

1. Familiarize yourself and your end users with new OOB Insights Reports and other RTM capabilities like marketing effectiveness dashboard
2. Educate end users on the differences within in-app reporting. Most of the reporting and KPIs are the same but visualizations are different.
3. If custom reporting is needed, recreate or reconfigure Custom reports. While the data models are the same between outbound marketing and real-time journeys, existing custom reports and pipelines need to be reconfigured to use the new data sources in Microsoft Fabric (when available).

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Chapter 3: Transition

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Let’s begin!

- Determine the right transition approach for your organization
- Deployments of different sizes and complexity may take different approaches to transitioning their journeys.
- 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 journeys.

Incremental Transition – Targeted OBM Journeys

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 journeys can run undisturbed by the transition

Drawbacks

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

Full Transition – Recreate all OBM Journeys

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)
- Some existing assets (journeys, forms, etc.) need to be rebuilt while others require import and verification, all within single milestone

Overview of Migration flow

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 journeys are needed? • Identify new or existing journey that would add value to be implemented in RTM • Try to avoid having a lift & shift approach • Use this as an opportunity to enhance journeys • Identify what channels are needed • Identify the journeys which can't be move to RTM due to feature parity and discuss with the business to strategize running the journey new way	**Setup Real-time Marketing Configurations** • Feature Switch • SMS provider • SMS Keywords • Push notification • Other Communication channels • Brand Profiles • Compliance	**Migrate visual elements** • Emails and Templates • Content Blocks • Text messages • Forms	**Build your segmentation logic** • Identify OBM Segment to move it to RTM Segments for enhance capability to create complex segments	**Build your custom triggers** • Identify scenario where you can create your own custom trigger or use OOTB trigger to create trigger-based journey **Build your journey** • Build the RTM journeys which you have identified to move it from OBM • Build new journeys if any	**Setup and build** • Identify existing custom report require re-build • Follow this link to understand the difference between OBM and RTM custom reporting infrastructure • Rebuild and enhance the custom report with more detailed insights
Business Decision	Manual	Tool/Manual*	Manual	Manual	Manual

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* Emails, Templates and Content block can be migrated using OOTB tool, where Text messages and Forms require to re-build manually.

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

Step #1: Install RTM to existing Dev environment*

- Configure RTM specific settings
- Identify OBM journeys to move to RTM
- Identify journey 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

- 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

Step #3: Install RTM to Prod environment*

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

Step #4: Run the journey in PROD

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

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* 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), 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.

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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 appropriate tracked and routed to a team of experts that will help you resolve your problems. CRM Support

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