

Microsoft Dynamics 365 Marketing Customer Survey

Purpose

The purpose of this 2-minute survey is to better understand your company's marketing objectives and how they specifically translate to your marketing automation needs. Completing this information will result in a productive and efficient conversation starter and possible demonstration to understand your requirements.

Please indicate your contact information

Company Name:

Your Name:

Title:

Email:

1. Please indicate your TOP marketing objectives for the next 18 months, by **checking only 5** from the below list:

- Better aligning marketing and sales for a single view of customer engagement
- Generating more and better qualifying leads
- Improving nurture and conversion strategies
- Consistently delivering personalized and relevant content day-to-day
- Marketing to existing customers to for loyalty and upsell opportunities
- Better measuring and analyzing marketing channels, performance and attribution
- Improving marketing operations and project management
- Improving collaboration within and outside the company
- Maintaining awareness and ability to quickly react to customer sentiment and communities
- Understanding how to leverage new technology for increased marketing performance (eg. AI, machine learning)
- Other (write in here):

2. How are your primary marketing efforts targeted? (check one)

- B2B | B2C | B2B primarily but with some B2C strategies included

3. How comfortable is your team with marketing automation? (rank 1-5 with 5 being most comfortable)

- 1 2 3 4 5

4. What marketing software are you using now?

Write in here:

5. What would you like to improve about your current marketing software? Check all that apply.

- Usability Reporting Integration with sales CRM Integrating social or SMS
 Email design/building Form/landing page building Lists/segmentation building Lead scoring
 Executing automated triggered customer journeys Other (write in here):

6. What do you like about your current marketing software? Check all that apply.

- Usability Reporting Integration with sales CRM Integrating social or SMS
 Email design/building Form/landing page building Lists/segmentation building Lead scoring
 Executing automated triggered customer journeys Other (write in here):

7. What other marketing software are you currently evaluating and what do you like about it? **Other software evaluating:**

- Usability Reporting Integration with sales CRM Integrating social or SMS
 Email design/building Form/landing page building Lists/segmentation building Lead scoring
 Executing automated triggered customer journeys Other (write in here):

8. Do you have any areas of concern related to Dynamics 365 Marketing?

9. Very important to ensure a demo is focused to your needs – Prioritize the channels you plan to utilize in the next 18 months? Check all that apply.

- Email marketing
- Webinars
- Hosting your own n-person events
- Attending others' events
- Telemarketing
- SEO/Keywords, Online ads
- Blogging
- Online communities
- Direct Mail
- Website (hosting whitepaper, videos, etc)
- Social posts – Write in your top platforms:

Other (write in here):

10. How many contacts/leads do you typically market to in your largest campaigns?

- | | |
|--------------------------------------|---------------------------------------|
| <input type="checkbox"/> <2,000 | <input type="checkbox"/> 100,001-250k |
| <input type="checkbox"/> 2001-10k | <input type="checkbox"/> 250,001-500k |
| <input type="checkbox"/> 10,001-50k | <input type="checkbox"/> 500,001-1M |
| <input type="checkbox"/> 50,001-100k | <input type="checkbox"/> 1M+ |

11. Rank in order which features or functionalities you are most interested in seeing in a Microsoft Dynamics 365 Marketing demo? (1 being most important and 11 as least)

- Creating personalized, dynamic emails
- Designing nurture campaigns with automated / triggered customer journeys
- Improving lead qualification and scoring
- Integrating SMS triggers
- Integrating social lead source attribution
- Creating web landing pages, forms, surveys
- Understanding sales and marketing alignment features / total view of the customer
- Marketing and campaign reporting/analysis/attribution
- Better integrating with LinkedIn
- Planning and managing events and webinars
- Creating advanced segmentation/lists
- Other (write in here):

12. What other roles/titles in your company have decision making influence on your decision?

Write in here:

13. Is new marketing automation software already budgeted? Yes | No

Are implementation services already budgeted? Yes | No

14. Do you currently use Microsoft Dynamics 365 CRM Sales? Yes | No

If not, do you plan on implementing in next 12 months? Yes | No

15. Do you already have a Dynamics 365 CRM partner? Yes | No **If yes, who is it?**

Are you considering another Dynamics 365 Marketing partner? Yes | No **If yes, who is it?**

16. Please add any other comments that will help Coffee + Dunn better understand your requirements.