



Dynamics 365 Marketing Transition Guide

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Table of contents

Table of contents	1
Introduction	2
Set up Dynamics 365 Marketing	4
Configure Dynamics 365 Marketing.....	4
Migrate data	6
Sync platforms	9
Retire previous solution.....	10
Get started.....	11

Introduction

Transition to Dynamics 365 Marketing creates an exciting opportunity for Sales and Marketing integration. Because of Dynamics 365 unique platform approach, Sales and Marketing share access to a common database of leads, contacts, accounts, opportunities, and more. No longer do Sales and Marketing have to debate which “version of the truth” is correct. However, with this powerful integration comes a reality check – are Marketing and Sales really ready to work together?

This document explains how to make a proper transition from your old marketing automation platform to the new platform, Dynamics 365 Marketing, and how to overcome challenges as the transition may affect the currently running marketing activities. From setting up Dynamics 365 Marketing to configuring the system, migrating data, syncing platforms, and to completely retiring from your old system, this document will provide methods to crawl, walk, and run through the transition.



Consider Current Process, Goals, Refined Process

Before launching into any system deployment (including Dynamics 365 Marketing), it is important to have a plan. That plan should contemplate:

- Company’s customer strategy – how it is driven by Sales and Marketing
- Sales and Marketing organizational alignment – roles, responsibilities, decisioning authority in relationship to customers and investments
- Sales and Marketing processes – for example, lead scoring and assignment
- Data input, access, and governance

For each of these areas it is important to understand the current process, goals, and refined process. Assessing the current process to identify challenges or gaps, can help bring alignment toward goals. A common mission to better define customer strategy, align Sales and Marketing, or improve data governance are all positive outcomes that can be achieved through a well thought through implementation.

Further, the goals identified can help shape the refined process. If that means more efficient processes, role realignments, or a new governance model, the success or failure of a Marketing Automation transition relies on a clear vision of the future state. The power of Dynamics 365 Marketing includes the ability to view and apply deep analytical insights about customer behavior and the organization’s strategy to influence it.

Achieve Organizational Buy In

Stepping outside of the current state, it is important to consider new opportunities and new channels through which to engage customers. Simply automating the “old way of

doing things” with a new technology is unlikely to achieve the desired outcome. Instead, reimagining the possibilities of seamless interactions with customers, whether Marketing or Sales led, is a critical input to migration success.

Successful migrations often start with discovery and planning workshops designed to uncover the challenges associated with the current technologies, processes, and strategies, and to define (and agree upon) a desired future state environment. Key participants for these workshops include Sales and Marketing leadership, in addition to IT. In many cases, this setting may be unusual or even uncomfortable as Sales, Marketing, and IT are not always aligned. However, breaking down barriers and engaging in open dialog can often lead to historically (or otherwise) hidden opportunities. Planning workshops should have the goal of delivering a new “blueprint” for customer engagement. The blueprint should outline customer engagement strategies, organizational alignment, key marketing and sales plays, and a technology roadmap (prioritized plan for Dynamics 365 rollout). With a blueprint in hand, the migration to Dynamics 365 Marketing becomes much more predictable and outcomes more achievable. In addition, all stakeholders across Sales, Marketing, and IT can share and communicate a common vision for the future.

Approach to Adoption: Crawl, Walk, Run

To balance the goals of successful transition and risk mitigation, we recommend a “crawl, walk, run” approach. Using the blueprint defined above, map out a set of modest interim goals that balance capturing quick win improvements with the inertia of significant change. This might mean focusing your efforts on a single group of marketers, campaigns, or customers. Pilot functionality to address the unique aspects of this group, while keeping in mind the larger picture.

Use this reduced scope to test, learn, and improve your use of Dynamics 365 Marketing. As the users and administrators become more proficient with the solution, begin to expand the scope of the implementation to include additional users, audiences, or functionality. Leverage Dynamics 365 Marketing’s inherent insights functionality to optimize the effectiveness of campaigns and other customer interactions.

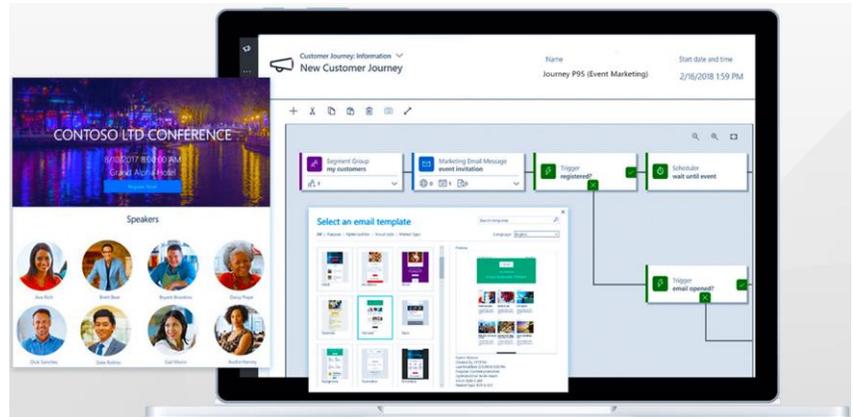
Finally, run. Take advantage of all that Dynamics 365 Marketing has to offer. A full breadth of direct marketing, social, and web capabilities coupled with the vast capabilities available in the Dynamics 365 Customer Engagement platform. Gather insights and apply learnings to future campaigns and customer engagement activities. Get ready for an exciting new world of fully aligned Sales and Marketing! So, how do we start?

Set up Dynamics 365 Marketing

The first step to transition is to set up and learn how to manage Dynamics 365 Marketing. You can [sign up and install a trial version](#) of Dynamics 365 Marketing for free. If you already have a paid Dynamics 365 for Customer Engagement instance in use, then you can [integrate Marketing with your instance](#) by adding the Marketing app to your tenant and assigning it to the appropriate instance.

Run the setup wizard

After you have purchased a license or signed up for a trial, you must run the setup wizard. Check out the prerequisites and requirements then follow the steps [here](#).



Configure Dynamics 365 Marketing

Once you have completed the setup process, you will have an empty environment. The next step is to begin configuring the tool for your marketing processes. Follow the steps below to complete your configuration.

1. Authenticate domain

[Domain authentication](#) is to detect forged messages and domains, and thereby prevent spam, phishing, and other fraudulent activity. You may have completed this step in your old marketing automation platform by simply verifying your domain or setting up custom DKIM (DomainKeys Identified Mail) authentication and adding the email provider/platform to your SPF (Sender Policy Framework) record. This is especially important to enable marketing email recipient email servers, like Microsoft or Google, to confirm that the from address shown on each of your messages belongs to your organization and that your organization approved Dynamics 365 Marketing to send messages on its behalf. It also confirms that you own the domain and therefore establishes an enhanced trust relationship with your domain for externally hosted forms.

2. Configure administration settings

Once Dynamics 365 Marketing is set up and the domain is authenticated, identify other [administration settings](#) that need to be configured. These settings help fine-tune application behavior, set defaults, manage users, enable webinars, check quotas, and more.

3. Configure content settings

Configure [content settings](#); this includes a subscription center link, a forward-to-a-friend link, social media links, mailing address, and other information that can be placed into the marketing email messages as dynamic values.

Remember, subscription center and physical mailing address are two required fields you must include when sending your commercial marketing emails via Dynamics 365 Marketing. You can set up the out-of-box subscription center as the default subscription center until you create your own subscription center.

4. Add web tracking script

Generate a new [tracking script for your website](#) and add the script onto your website to start tracking contact website behavior and bring in the information into Dynamics 365 Marketing. You may already have the old tracking script on your current website. Keep the script until you are completely out of your old marketing automation platform.

5. Customize marketing

If you are a customizer, you can add new fields to existing entities, add or hide fields in list or form views, design custom business processes and workflows, and more. For example, a typical lead lifecycle goes from building contact database to lead generation to lead nurturing/scoring then to opportunity and contact. You can customize this process and keep track of it by building a [lead business process](#) or workflows. You can also customize and integrate with external systems through code-based interactions with the system's various APIs. Click [here](#) for more about customization. For any additional business needs, check out [AppSource](#) to extend the capabilities and features of Dynamics 365 Marketing.

Migrate data

After configuring Dynamics 365 Marketing, you need to migrate data and move marketing initiatives from your old marketing automation platform to Dynamics 365 Marketing. After you complete each step, make sure to test. Here's the recommended steps to successfully migrate data.

1. Export data

Export reports, metrics, KPIs, contact lists, and any other data from your old marketing automation platform that may be useful for your future marketing initiatives in Dynamics 365 Marketing. Get as much data downloaded and stored as possible because this data will not be accessible in the future. This is also an opportunity to redefine your reporting needs. Consider your marketing goals and objectives. What information is important going forward? For your key metrics, build out usable reports to compare to the new data that will be available in the new system. Other data can be stored and archived. For data unable to download, consider manually transcribing or taking screenshots.

2. Set up contact and lead attributes

Contacts and leads are often stored in a list within other marketing automation systems. Dynamics 365 Marketing requires contact and lead attributes for segmentation. Review your contact and lead data and decide what information is important for segmentation. Create those attributes on the contact and lead record.

3. Import leads and contacts

If you have any leads or contacts in the old marketing automation platform that are not in your Dynamics 365 environment, [import those leads and contacts](#). You can import any other entity data into Dynamics 365 using Excel. If you are already using Dynamics 365 for Customer Engagement, note that marketing shares data with other Dynamics 365 applications running on the same instance, and operates on many of the same database entities, including contacts, leads, accounts, and [more](#). Once you have all leads and contacts in your system, [create segments](#) to target in your journeys.

4. Establish naming conventions

Naming conventions are critical for search, views and reporting. Review your current naming conventions and establish what information needs to be included. Consider the attributes of the entity as they can appear in a list view and may not need to be part of the name. Naming conventions are especially important for the asset library in Dynamics 365 Marketing because no folder structure is currently available.

5. Upload images

Download all images related to your marketing initiatives and upload them to Dynamics 365 Marketing. Supported image format types are GIF, BMP, JPEG, and PNG. To see how to upload and use images and files, click [here](#).

6. Create marketing forms and pages

Create [marketing form and page templates](#) in Dynamics 365 Marketing. Then, re-create all active marketing web [forms](#) and landing [pages](#) using the new templates. All image references should point to local Dynamics 365 Marketing asset folders. You can also provide [personalized page content](#), [enable prefilling for forms](#), [integrate with landing pages on external websites](#), and [create input fields for forms](#).

7. Create subscription centers

Create all active [subscription centers](#). Dynamics 365 Marketing requires at least one subscription center, along with a physical mailing address, to be included in your commercial marketing emails. To create a subscription center, you first need to create [marketing lists](#) then create a subscription form to add the lists to. Ultimately, you will be creating a subscription center to include in the subscription form. The marketing lists here are created in the Dynamics 365 environment as subscription lists. Note that this is different from a segment, what Dynamics 365 Marketing uses to engage with contacts. Moreover, once you create a default subscription center for your organization, make sure to specify this in the content settings (refer to the Configure Dynamics 365 Marketing section).

8. Create marketing emails

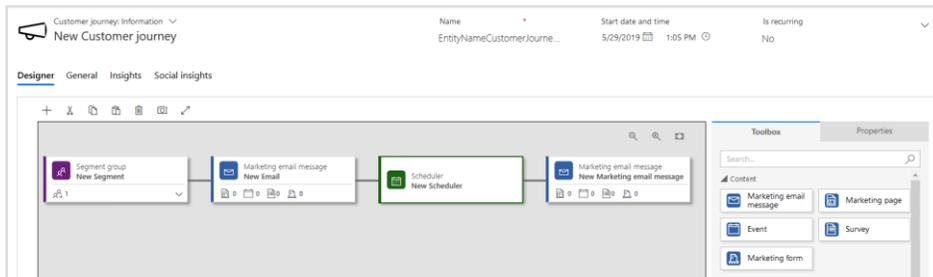
Create [marketing email templates](#) in Dynamics 365 Marketing using the drag and drop or HTML editor. Use the [assist-edit](#) feature to include all required default values. Then, use the templates to create all active [marketing emails](#). If you are using the HTML editor to copy and paste the codes over, make sure to understand the [custom attributes](#). All image references should point to local Dynamics 365 Marketing asset folders. Likewise, all landing pages and surveys should point to local Dynamics 365 Marketing values.

9. Create surveys

Dynamics 365 Marketing will transition from using Voice of Customer to [Microsoft Forms Pro](#) to enable customers to create surveys in October 2019. Use Microsoft Forms Pro to create [surveys](#). Note that Microsoft Forms Pro uses prebuilt functionality for survey question creation, conditional branching rules, and custom themes to personalize your surveys.

10. Create customer journeys

In most marketing automation platforms, a campaign is a holding entity for a group of emails and forms. In Dynamics 365 Marketing the customer journey automates the campaign process. You can visualize and automate campaigns that customers will take while interacting with your marketing initiatives on their way to making a purchase; you can put a campaign flow into a customer journey and automate the process through the journey. Create all active [customer journeys](#). If you have similar customer journey patterns across



campaigns, you may [create customer journey templates](#) or save an existing customer journey as a template. You may want to run a simple email journey to test the customer journey feature:

- a) Create a new customer journey
- b) Select the out-of-box simple email journey template
- c) Specify a segment and marketing email. Create a segment that includes internal users for testing purposes. Create a simple marketing email with the appropriate from name and address specified
- d) Add additional marketing email(s) if necessary
- e) Add scheduler if necessary
- f) Check for errors. If validation fails, view and fix the errors
- g) Go live

It is also recommended to screen shot any campaigns/journeys from your current system and store them in a shared space. Once the old system is turned off, you will not be able to access the campaigns/journeys. It can be helpful to refer to them at a later time.

Sync platforms

Most likely you still have some live campaigns in your old marketing automation platform. In this case, you need to keep both platforms in sync until the campaigns reach the end and none of the contacts are being processed. Below are the recommended steps.

1. Sync entity forms, data, and workflows

During the transition, there may be lots of process and data changes. You must reflect these changes in both systems.

2. Monitor and review contacts

Frequently monitor and review your live campaigns in the old marketing automation platform for any new contacts being added to the campaigns. Build a process to manually add or import any new contacts into Dynamics 365 Marketing until completely retiring from the old platform. You may consider using [Microsoft Flow](#) if your old platform exists as one of the [connector options in Microsoft Flow](#).

3. Track and evaluate bounced email addresses

Track bounced email addresses in your live campaigns for your future engagements in Dynamics 365 Marketing. Build a process to evaluate and exclude these contacts from your marketing initiatives to help increase deliverability in your new platform. You may utilize [Microsoft Flow](#) if your old platform exists as one of the [connector options in Microsoft Flow](#).

4. Manage and sync contact preferences

Just like tracking bounced email addresses and reflecting the changes in both platforms, for any contacts opting in/out or changing contact preferences while transitioning, you must build a process to update both platforms to reflect these changes. Note that there will be no direct connection between your old platform and Dynamics 365 Marketing. Consider using [Microsoft Flow](#) if your old platform exists as one of the [connector options in Microsoft Flow](#).

Retire previous solution

Once you have no more live campaigns or contacts being processed in your old marketing automation platform, you can retire from the platform and move fully onto Dynamics 365 Marketing. Here are some recommended steps before you completely move on from your old platform.

1. Redirect old URLs

Emails sent from your old marketing automation platform will likely include hyperlinks to landing pages, forms, or surveys directed to your old platform. Once the platform is turned off, these links will be broken. [Redirect these links](#) to the new pages, forms, and surveys created in Dynamics 365 Marketing.

2. Export reports

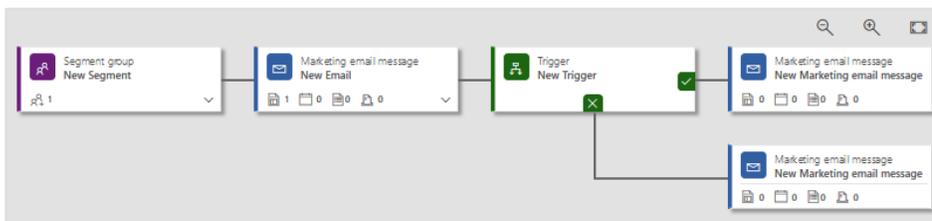
Make sure you exported all final reports, metrics, and KPIs from your old marketing automation platform before it completely goes away. If you do not know where to store your reports and you want to combine metrics in both systems, consider [using Power BI](#) to connect different data sources and build custom analytics. For reports unable to download, consider manually transcribing or taking screenshots.

3. Deactivate and remove data

Remove all web tracking scripts from your old marketing automation platform. Delete subdomain and email authentications. Deactivate any integrations. You may keep data in the old platform, but it is best practices to remove all sensitive data.

Get started

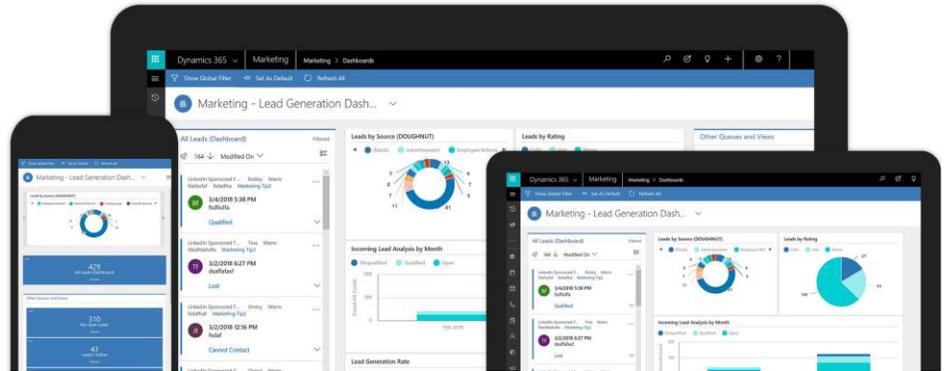
When considering a process to start in Dynamics 365 Marketing, choose something with a middle level of complexity. You will want to test out a process with various emails, triggers, forms and pages so you can monitor all aspects of your marketing process, gather insights and improve going forward. Let's say your organization wants to send out different emails based on whether someone submitted a marketing page or not. Below are the steps to create a customer journey for the given scenario within Dynamics 365 Marketing:



1. [Create a dynamic segment](#) using a set of rules and conditions (e.g., contacts over 50 living in Chicago)
2. Create a [marketing form](#) and [marketing page](#). You must first create a marketing form and map all fields as needed. Then, create a marketing page to add the marketing form to
3. [Create three marketing emails](#) using the drag and drop tool or HTML editor. We will use the first marketing email to send the initial message, which includes the marketing page we created in Step 2. We will include the second marketing email for those who submitted the page and third for those who did not. Here are some [best practices for email marketing](#)
4. Let's combine them all into a journey. [Create a new customer journey](#). Add the tiles as the following order:
 - a. **Segment**
 - b. **Marketing email 1**
 - c. **Trigger**
 - d. **Positive path:** Marketing email 2
 - e. **Negative path:** Marketing email 3
5. Identify the target segment which we created in Step 1. Add the marketing emails to the appropriate marketing email tiles, which was done in Step 2
6. Drag and drop the marketing page tile onto the first marketing email tile. Expand the tile and select the marketing page sub-tile. Specify the marketing page

7. Specify the trigger. Add the timeout value. Add a new rule and specify the source as the marketing page and condition as page submitted
8. Check for errors and go live if validation passes. Otherwise, view and fix the errors
9. After opening and clicking the emails sent out, review [insights](#) of your customer journey, marketing emails, contacts, and more. Now you can adjust further journeys to achieve better customer interaction in the future.

Please visit our webpage to [try Dynamics 365 Marketing](#). There is additional product information available in [Help Documentation Page](#). We hope your transition will be easy. If you have any questions during your implementation feel free to engage with experts in the [community forum](#) to get additional best practices and answers to your questions.



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