



# Dynamics 365 Marketing Pre-Sales Survey

September 2018



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# Survey 1: Fit Qualification

#	Question	Type	Options	Purpose
1	First Name	Text		Contact Info
2	Last Name	Text		Contact Info
3	Title	Text		Who are we speaking to?
4	Company	Text		Contact Info
5	Email	Text		Contact Info
6	What is your role in the evaluation process?	Option Set	Decision Maker, Influencer, End User	Are we speaking to the decision maker?
7	What other roles are involved in the evaluation?	Checkbox	Sales, Finance, IT, Marketing – Leadership, Marketing – System User, Procurement	What roles do we need to focus sales efforts on?
8	Do you have a project sponsor? If so, what is their role?	Multi-Line Text		How serious are they about finding a new solution? What support does the project have?
9	When are you looking to move to a new marketing automation platform?	Option Set	1 month, 3 months, 6 months, 12 months, We have no set timeline and are currently just gathering information	Assess the degree of seriousness and indicates how to align sales effort.
10	What is your budget for annual software license and support?	Option Set	\$10,000, \$30,000, \$50,000, \$100,000, \$100,000+	Assess the seriousness and degree of commitment to marketing automation. Position Dynamics 365 Marketing favorably versus more expensive competitive alternatives.

11	What is your (one-time) implementation budget to transition to a new marketing platform?	Option Set	\$10,000, \$30,000, \$50,000 \$100,000 \$100,000+	Assess the client's understanding of requirement for partner consultation needed to achieve successful implementation.
12	What is your Dynamics 365 version?	Option Set	Dynamics 365 (online), Dynamics 365 (on-prem) Dynamics 9.0, Dynamics 8.0, Not Sure, We do not have Dynamics 365	Client must have Dynamics 9.0 to use Dynamics 365 Marketing. Other version will require client to upgrade. Identifies need for version upgrade discussion.
13	If you do not have Dynamics 365 (online), version 9.x currently, do you plan to upgrade in the future?	Option Set	Yes No Not Sure	Client must have Dynamics 9.0 to use Dynamics 365 Marketing. Other versions will require client to upgrade. If not able to upgrade, end discussions.
14	Do you have an existing Dynamics partner? If so, who is it?	Text		Do they need a Dynamics partner? Assess partner certification and capability to deliver Dynamics 365 Marketing.
15	What channels do you use for marketing (select all that apply)?	Checkbox	Email, Phone, SMS Messaging, Social Media, Paid Advertising, Direct Mail, SEO/Keywords, Website, Events	Identifies what channels are they looking for in a marketing automation solution. Serves as a measure of client's overall level of maturity and sophistication.
16	What other marketing solutions are you evaluating at this time? (select all that apply)?	Checkbox	Act-On, Adobe Campaign, ClickDimensions, Eloqua, Hubspot, Marketo, Pardot, Salesforce Marketing Cloud, Silverpop, Other	Understand the competitive landscape from client's perspective. Allow for the ability to position Dynamics 365 Marketing in the best light and respond to competitive positioning. Is an indirect indicator of client budget and overall understanding of the market.

If Other, please specify

Text

Lesser known brands may indicate budget challenges or relationship bias.

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Thank you for your time! We will reach out shortly with next steps.

# Survey 2: Scope Discovery

Introduction: Thank you for your interest in [Dynamics 365 Marketing](#). We have received your initial survey responses and feel that Dynamics 365 Marketing can be a potential fit for what you are looking for. Our next step is to identify a demonstration need tailored to your business objectives. Please respond to the following questions so we can focus the conversation.

Page 1: Tell us more about your marketing

#	Question	Type	Options	Purpose
1	What are your business objectives around Marketing Automation?	Text		Scope; What business impact are they hoping to accomplish with marketing automation?
2	What functional outcomes do you wish to achieve to support these business objectives (check all that apply)?	Checkbox	Generate more leads, Integrate Sales and Marketing, Nurture and convert leads to opportunities, Market to existing customers, Create personalized, segmented marketing campaigns, Measure marketing performance, Utilize LinkedIn lead generation forms, Manage trade shows and events, Other	Scope; What scenarios are best to demo? Is also a measure of company's understanding of marketing automation and preparedness to utilize it.
	If Other, please specify	Text		Scope; What scenarios are best to demo?
3	What is the average length of your sales cycle?	Option Set	<1 Month, 2-3 Months, 4-6 Months, 7 Months – 1 year, 1 year or more	Scope; Provides additional demo details and discussion points.
4	How many contacts/leads do you typically market to?	Option Set	<2,000 2,001 – 10,000, 10,001 – 50,000 50,001 – 100,000	Assess the potential cost of Dynamics 365 Marketing. An indirect measure of complexity for client implementation.

			100,001 – 250,000 250,001 – 500,000 500,001 – 1,000,000 1,000,001 or more	
5	Where are your contacts/leads currently stored (select all that apply)?	Option Set	Dynamics 365, external database, 3 <sup>rd</sup> party	Understand if data migration is required to bring contacts into Dynamics 365.
6	What percentage (%) of repeat customers do you have?	Text		Access client's marketing focus as primarily to customers or prospects.
7	Do you have a marketing/campaign calendar?	Option Set	Yes, No, Not Sure	To determine scope. Serves as a measure of client's overall level of maturity, sophistication, and preparedness. Potential for roadmap discussion about marketing calendar.
8	Do you have a lead scoring process/model?	Option Set	Yes, No, Not Sure	To determine scope. Serves as a measure of client's overall level of maturity and sophistication.
9	Do you have/use subscription centers or wish to?	Option Set	Yes, No, Not Sure	To determine scope. Serves as a measure of client's overall level of maturity and sophistication.

Page 2: Tell us more about your software evaluation

#	Question	Type	Options	Purpose
10	How comfortable is your team with marketing automation? (1 is not comfortable at all, 10 is extremely comfortable).	Rating	1 -10	Scope; What level of detail is best to demo? How much education is required?
11	What experience do you have with other marketing automation software (select all that apply)?	Checkbox	Act-On, Adobe Campaign, ClickDimensions, Eloqua, Hubspot, Marketo, Pardot, Salesforce Marketing Cloud, Silverpop, Other	Level of expertise/sophistication; What solutions are competing with Dynamics 365 Marketing?

If Other, please specify	Text		
12 Do you have marketing automation requirements documents, use case document or customer engagement scenario document that we can use to show you a custom demo for this product? If so, please zip and attached all related files here:	Option Set	Yes, No	Scope; How serious and how prepared are they about finding a new solution?
13 Are you seeking Managed Marketing Services?	Option Set	Yes, No, Not Sure	Scope
14 Are you seeking Best Practices/ Advisory Services?	Option Set	Yes, No, Not Sure	Scope

Thank you for your time! We will reach out shortly with next steps.





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