



DYNAMICS CON PRESENTATION



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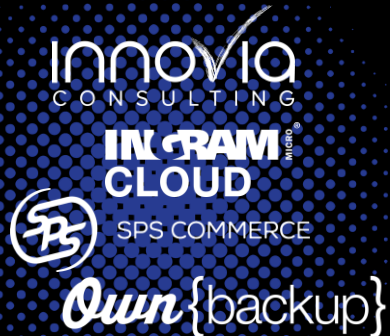
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**SEPTEMBER 14-16,
2022**



First Party Apps + Marketing App Deep Dive

An Overview of Dynamics 365 CE





Chad Althaus



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Houston, TX



Passion for Dynamics 365 & Power Platform



Background in Mechanical Engineering & Operations



Co-leader of Houston D365 CE User Group



@ChadAlthaus



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DynamicsCon

Agenda

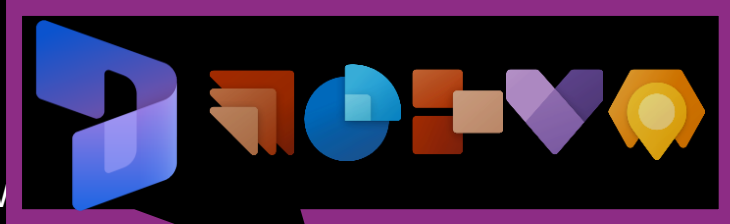
- **Power Platform overview**
- **First party apps**
 - Overview
 - Who's it for?
 - Notable features
 - Related apps
- **Marketing deep dive**



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Power Platform



The low-code/no-code platform for building business solutions across Microsoft Dynamics 365, Dynamics 365, and standalone applications.



Power BI
Business Analytics



Power Apps
App development



Power Automate
Process automation



Power Virtual Agents
Intelligent virtual agents



Power Pages
External-facing websites



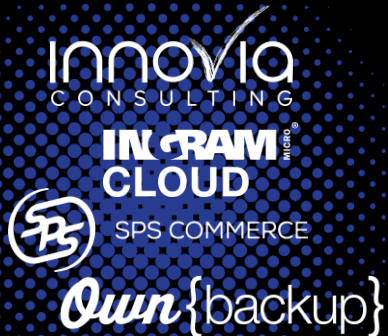
Data connectors



AI Builder



Dataverse





Dynamics 365



Marketing



Sales



Project Operations



Customer Service



Field Service

**First Party
Apps**

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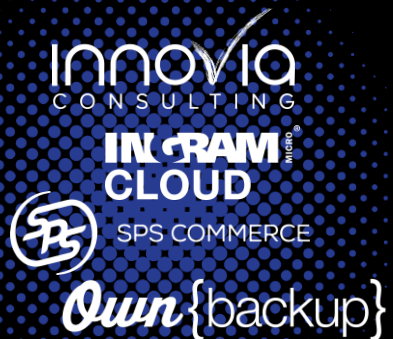
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- **Engage customers and manage relationships (CE/CRM)**
- **All the benefits and extensibility of the Power Platform**
 - Office 365 integration
 - Workflow automation
 - Built atop Dataverse
- **First party reporting (ever-improving)**





Marketing

Elevate customer experiences

- **Generate and nurture leads**
- **Email marketing**
 - Outbound and real-time
- **Event management**
- **Portals**

Rich analytics



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Marketing

Who's it for?

- Companies desiring greater engagement with their customers

Notable Features

- Custom triggers
- Customer Insights segments
- Teams webinars
- Lead scoring

Related Apps

- Customer Insights
- Customer Voice

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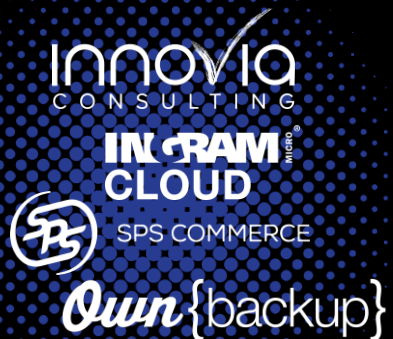


Sales

Turn relationships into revenue

Manages the sales lifecycle:

- Lead > Opportunity > Quote > Order > Invoice
- Some outbound marketing functionality



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Sales

Who's it for?

- Anyone with a product to sell, independent sellers to large teams

Notable Features

- Sales accelerator
- Deal Manager
- Assistant
- Lead scoring
- Teams calling

Related Apps

- Sales Insights
- Relationship Sales (LinkedIn)
- Mobile app

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Project Operations

Empower project-centric organizations with the visibility, collaboration, and insight needed to drive success across operations - from prospect to cash.

- **Manage project lifecycle**
 - Project-based services and project types
 - Project leads, opportunities, contract, and pricing
- **Connects sales, resource, project management, and finance**





Project Operations

Who's it for?

- Organizations with heavy project-based workloads that need tracking from quoting to invoicing

Notable Features

- Project planning w/ Project for the Web
- Resource management w/ FS & CS
- Bridges both CRM and ERP seamlessly

Related Apps

- Sales
- Supply Chain Management

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Customer Service

Earn customers for life

Manages the case lifecycle:

- Omnichannel entry points
- Queues & Routing
- Service Levels and Terms
- Agent productivity
- Knowledge Base





Customer Service

Who's it for?

- Customer-facing support teams
- Teams with internal requests
 - E.g., IT help desks

Notable Features

- Omnichannel
- Smart Assist
- Agent scripts
- Teams chat
- Historical analytics

Related Apps

- Power Virtual Agents
- Customer Insights
- Customer Voice

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Field Service

Exceed customer expectations through empathetic, predictive, and connected experiences.

- Work orders
- Inspections
- Customer assets
- Resource scheduling



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Field Service

Who's it for?

- Organizations with a mobile workforce
- Organizations with inventory at client sites

Notable Features

- IoT-triggered alerts
- Resource schedule optimization
- Work order templates
- Mobile app

Related Apps

- Remote Assist
- Guides

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More on Marketing!



Marketing App



**Core
concepts**



**Real-time
marketing**



**Outbound
marketing**



**Event
planning**



**Customer
Insights**



**Customer
Voice**



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Marketing App Basics

- Heavy Microsoft investment
- ~~ClickDimensions~~
- Licensing
 - Pay for your contacts, not your users
 - Typically an add-on
- B2B vs. B2C
- GDPR Compliance





Real-Time Marketing

Engage with customers real-time:

- Journeys
- Triggers
- Segments



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Outbound Marketing

Engage with customers in big blasts

- Journeys
- Triggers
- Segments



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Event Planning

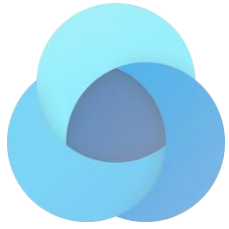
Engage with customers in big blasts

- Journeys
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Customer Insights

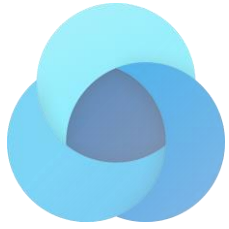
Microsoft's "Customer Data Platform"

- Unify customer data from various data sources
- Connect data from transactional, behavioral, and demographic data sources to create 360-degree customer views
- Third-party enrichment



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Customer Insights

Use in Marketing app

- Define segments from CI profiles
- Dynamic content from CI profiles



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Customer Voice

Feedback management solution (a.k.a. SURVEYS)

- Built on Microsoft Forms
- Poll your customers on satisfaction, suggestions, etc.
- Integral for customers looking to enhance their customer experience



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Customer Voice

Use in Marketing app

- Send surveys within a customer journey
- Include survey link within an email
- Create a segment based on survey responses



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In Review



Marketing



Sales



Project Operations



Customer Service



Field Service

Marketing App:



- Real-time marketing
- Outbound marketing
- Event planning

Add-Ons

- Customer Insights
- Customer Voice



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Thank You!

Questions?