

EDUCATIONAL SESSION

Presented by: Sy Nayman, Consulting Manager, RSM



Data policies when you're using marketing automation & D365/CRM

RSM, US LLP.

 **D365UG**

 **CRMUG**

Presenter: Sy Nayman, RSM, US

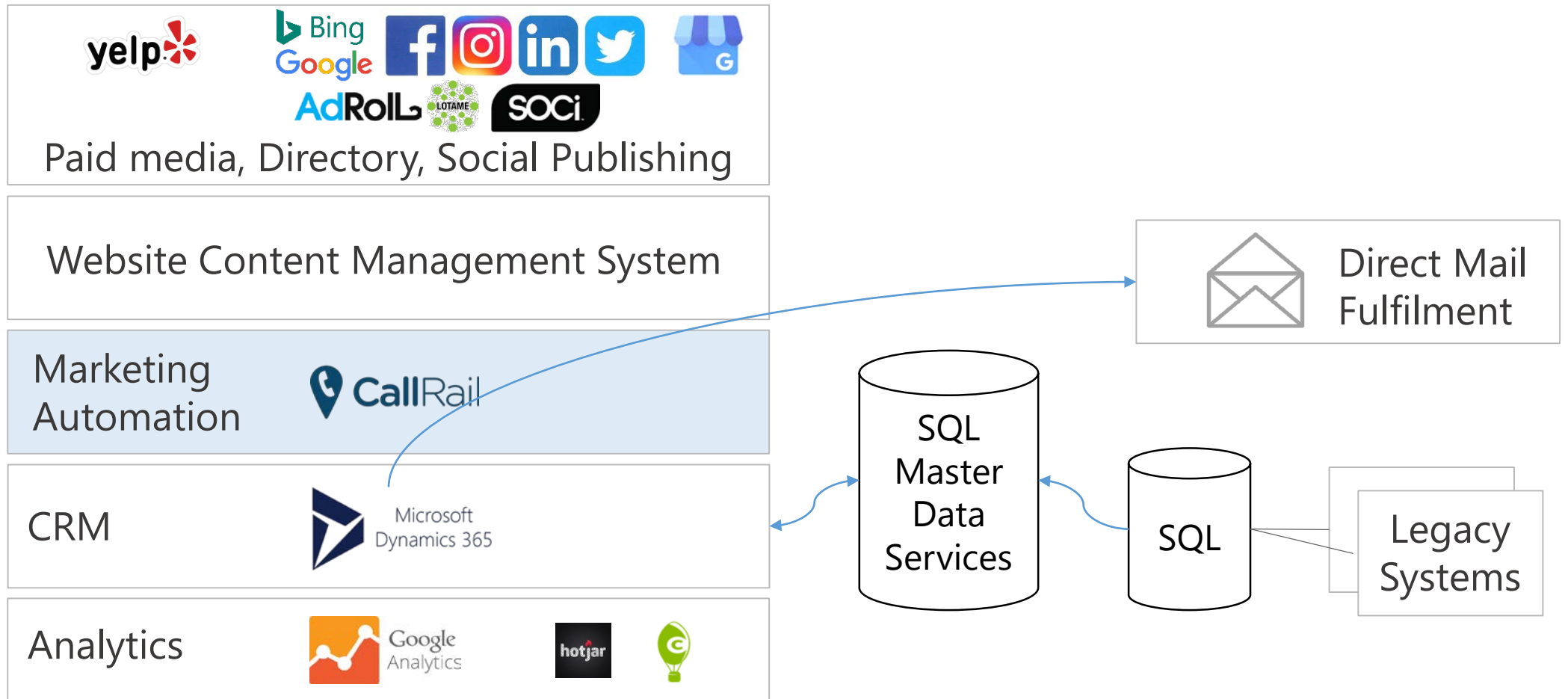


National Marketing Automation SME

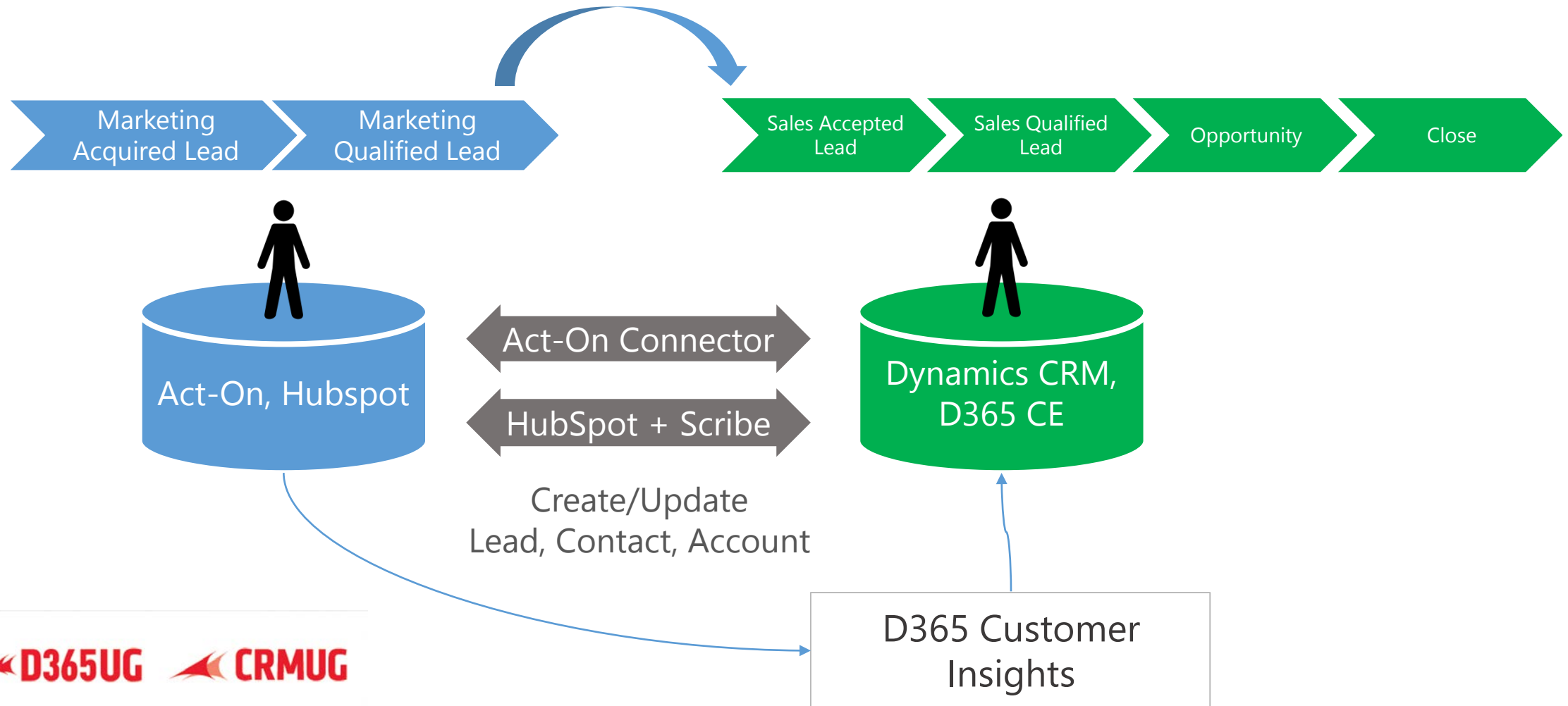
- 20 years' marketing practitioner: B2B, tech, health, med device; B2C consumer health – who also knows D365 CE for Sales
- Marketing Tech Stack Architect (Data integration, HTML/CSS, Content Management Systems, Forms, JavaScript, etc)
- Certified ClickDimensions, Pardot
- Hands on Pardot, Marketo, Eloqua

Marketing Automation Definitions

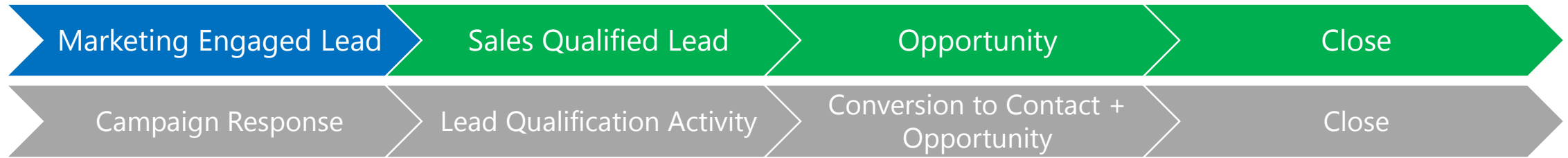
Marketing and Customer Service Stack



Lead to Close, Separate MA & CE/Sales



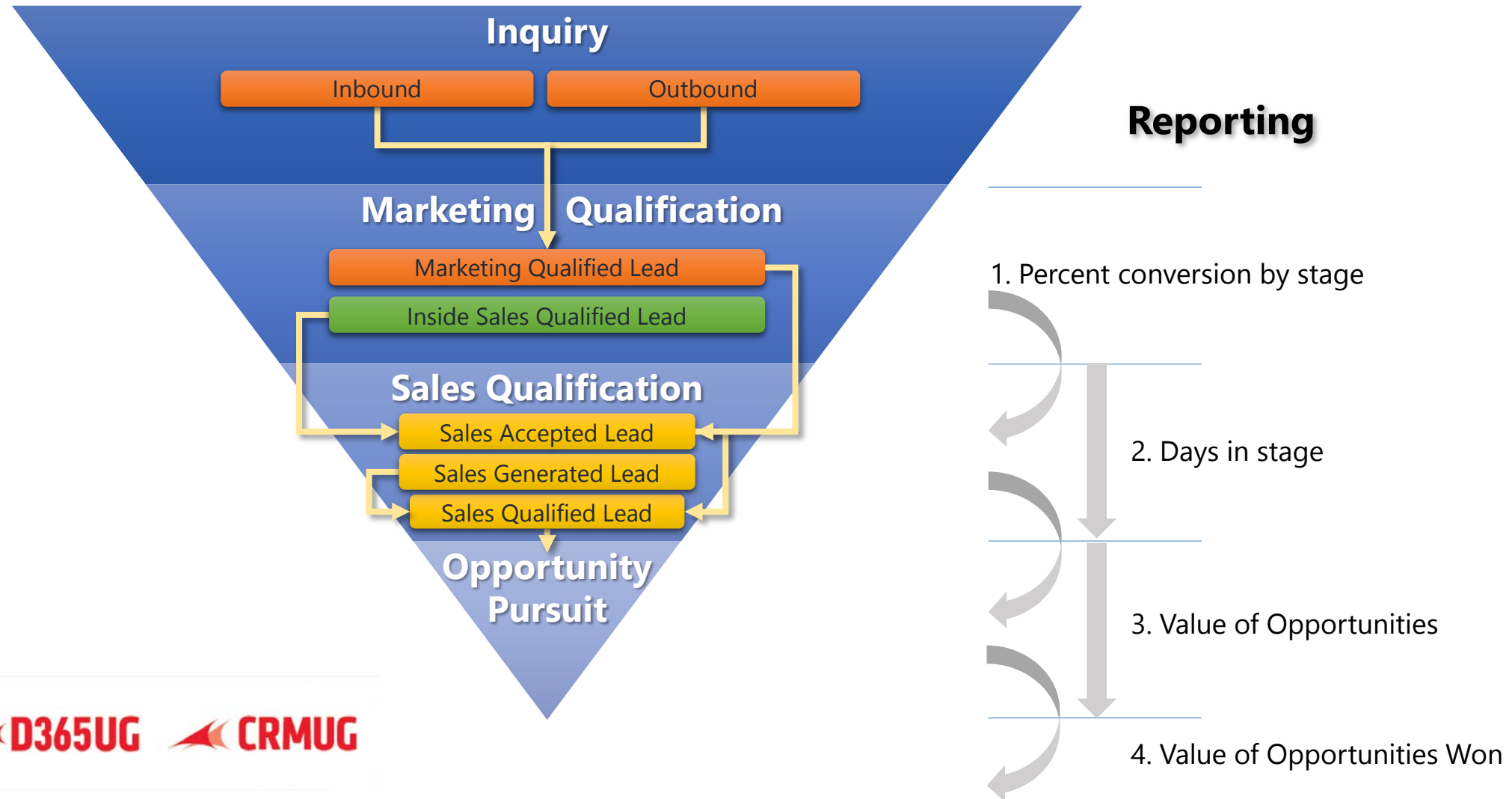
Lead to Close, All-in-One MA & CRM



ClickDimensions, D365 CE Marketing

SaaS services:
Sending email server, Web
content and images
hosting, 3rd party
connectors, process
automation

B2B Waterfall Process and Reporting Goals



DEMO: ClickDimensions and D365 CE Marketing Scope

Data Policies in Support of Marketing Automation

Data-Dependent Automation Concepts

1. Segmentation

- Right Person/s,
Advanced Find

2. Lifecycle Stage

- Lead, Opportunity Sales
Stages

3. Automation Triggers

- CRM Workflow on-
update, Email Click

4. ROI reporting

- Attribution

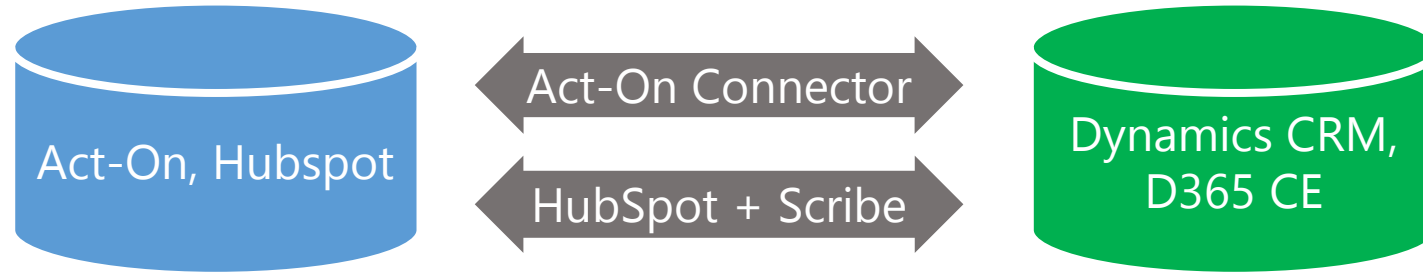
5. Web Forms

- Form fields, mapping
- Match and update

Legal Frameworks

1. California Consumer Privacy Act (**CCPA**)
2. Canadian Anti-Spam Law (**CASL**)
3. General Data Protection Regulation (**GDPR**)

All-in-One or Connected?



OR



ClickDimensions, D365 CE Marketing

1. Segmentation

The Right Person

Goal: clean and targeted marketing lists

1. Critical segments: a. Addressable Leads/Contacts and Non-Addressable; b. Opt-In; c. Unsubscribe from bulk email
2. First train Marketers on CRM's entities fields and relationships, then Advanced Find.
3. Easy approach: surfacing critical segmentation attributes as fields on lead or contact. D365 Marketing generally requires entity fields outside of Account and Opportunity to be surfaced on Contact.

2. Lifecycle Stage

Where are we in the prospect or customer relationship?

Goal: characterize the relationship

1. Achieve 0 dupe email addresses across leads and contacts. Out of box CRM Lead creates duplicate data for Marketers, because deactivated Leads maintain the same email address as the Contact.
2. Map the Marketing + Sales Process, consider implementing as a flag field on Lead and Contact
3. Solve for too few Contacts associated to the Account+Opportunity

3. Automation Triggers

Right time.

Goal: the event is visible to an automation trigger

1. Marketing automation platforms see events in their own assets: form submission, email clicks
2. CRM events downstream of marketing stages need to be visible marketing automation: Opportunity Closed Won, Opportunity Closed Lost, Lost Customer

4. ROI Reporting

What half of our Marketing dollar is working?

Goal: associate Marketing Campaign to Opportunity Closed/Won

1. Marketers shall create discrete campaigns for any activity that requires budget.
2. The Campaign Response or list is associated to the Campaign
3. Contacts are associate to Accounts for downstream Opportunity association (PowerBI Dashboard)

5. Web Forms

Create/Update Lead or
Contact a Web form

Goal: lead acquisition, Web form sign up

1. To update or not to update existing data. Goal is to stage Web form data for review and inclusion into the CRM record. Not overwrite
2. Mapping form fields. Determine Web form field type compatibility to CRM field. Hint: don't try to write into CRM Lookup fields.

Parting Tips

1. Make a Data Dictionary report to show Marketers the possibilities and constraints of your system's fields, entities and relationships. Report: entities, fields, count of records that have the fields populated, field data type.
2. Marketers should have good data intuition. And you need to get their business requirements, regularly to stay aligned with their calendar of activity and reporting roadmap.
3. Align early on outbound marketing efforts, requiring Marketing Lists to set expectations on constraints early.



**THANK YOU
FOR ATTENDING!**