

# Increase your impact with Microsoft Dynamics Marketing

See what you can do with this  
powerful marketing solution

Microsoft Dynamics Marketing



For  
Marketing  
Professionals

# Welcome to Microsoft Dynamics Marketing!

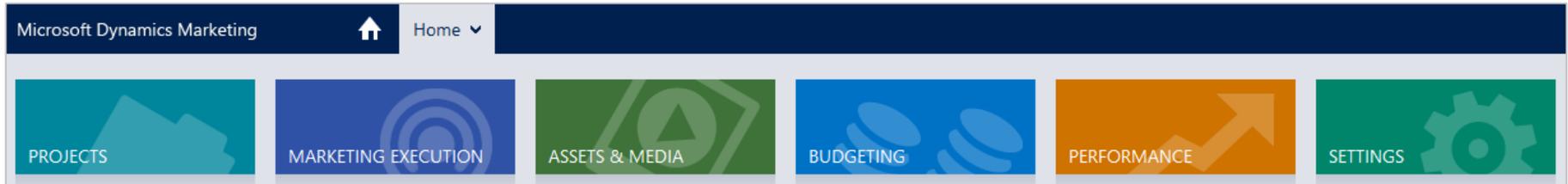
Microsoft Dynamics Marketing helps you plan and execute effective marketing campaigns to reach your customers and build your sales pipeline. It gives you the tools you need to measure how your campaigns are performing.

This eBook provides a visual overview of major Dynamics Marketing features together with links to online Help topics that provide detailed instructions.



# navigate quickly with tiles

After signing in, choose **Home** in the navigation bar to see tiles for the marketing tasks you do every day.



The screenshot shows the Microsoft Dynamics Marketing interface. At the top, there is a dark blue navigation bar with the text "Microsoft Dynamics Marketing" on the left, a home icon, and a "Home" dropdown menu. Below the navigation bar, there are six colored tiles, each with an icon and a title. Below each tile is a brief description of its function.

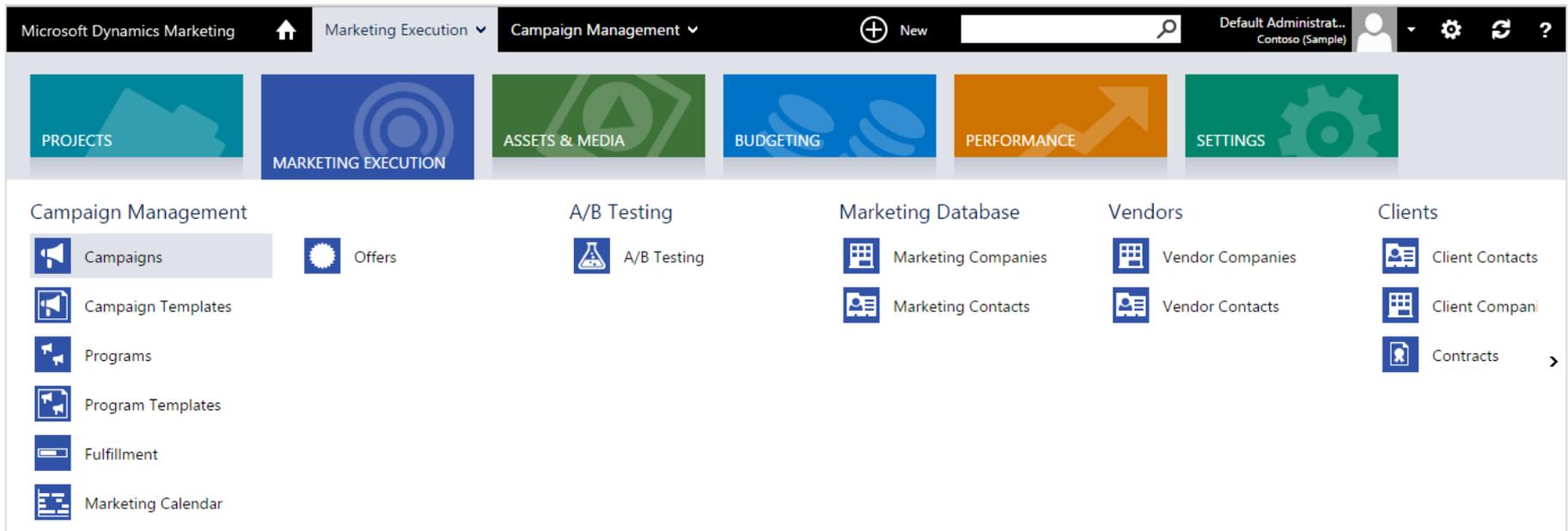
Tile Title	Description
PROJECTS	Assign tasks and manage your team's projects
MARKETING EXECUTION	Here's where you'll do most of your work, like running campaigns or managing leads
ASSETS & MEDIA	Keep track of all your marketing collateral and media placements
BUDGETING	Monitor your expenses, quotes, payments, and invoices
PERFORMANCE	Get reports on your campaigns, media activities, and projects
SETTINGS	Set up users, roles, and system settings

[Get more details in Help](#)



# explore marketing execution

Under the **Marketing Execution** tile, for example, you'll find tools to help you set up campaigns, manage leads and contacts, create marketing lists, oversee marketing events, work on your marketing plans, and more. The navigation bar updates to show a breadcrumb with the path to your current location, which is also highlighted in the menu.



The screenshot displays the Microsoft Dynamics Marketing interface. The top navigation bar includes the following elements from left to right: "Microsoft Dynamics Marketing" with a home icon, "Marketing Execution" with a dropdown arrow, "Campaign Management" with a dropdown arrow, a "New" button with a plus icon, a search bar, and a user profile section for "Default Administrat... Contoso (Sample)" with a dropdown arrow, settings gear, refresh, and help icons.

Below the navigation bar is a row of six main tiles: "PROJECTS" (teal), "MARKETING EXECUTION" (blue, highlighted), "ASSETS & MEDIA" (green), "BUDGETING" (blue), "PERFORMANCE" (orange), and "SETTINGS" (green).

The "MARKETING EXECUTION" tile is expanded to show a sub-menu with the following categories and items:

- Campaign Management**
  - Campaigns (highlighted)
  - Campaign Templates
  - Programs
  - Program Templates
  - Fulfillment
  - Marketing Calendar
- Offers**
  - Offers
- A/B Testing**
  - A/B Testing
- Marketing Database**
  - Marketing Companies
  - Marketing Contacts
- Vendors**
  - Vendor Companies
  - Vendor Contacts
- Clients**
  - Client Contacts
  - Client Compani
  - Contracts >

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Execute effective  
campaigns

# build automated campaigns

Create a campaign by dragging and dropping activities to a canvas and arranging them in the order you want them to execute. You'll find the campaign visual designer under **Marketing Execution > Campaign management > Campaigns**. You can even configure and create entities on-the-fly while you work here.

CAMPAIGN

Enterprise Lead Nurturing Campaign (Sample) (100009)

ACTIVATE VALIDATE

Prospects for Nurturing ... 50

Nurture campaign Initial ... Draft

Webinar Registration (Sa...

User Registered 0

Registered for Webinar ... 0 0 0

Wait 10 days

Activities Properties Goal

- Action Type
  - Email
  - Landing Page
  - Task
  - Scoring
  - Social Media
  - Edit Marketing List
  - Printed Mail
  - Event
  - Offer
  - A/B Testing
  - Webinar
- Marketing Lists
  - Static
  - Dynamic
- Response
  - Scheduler
  - Trigger

Drag actions, lists, or responses from the sidebar to the canvas

[Get more details in Help](#)



# prevent email fatigue

Sending people too many marketing emails can annoy them and reduce your open or click rate.

Dynamics Marketing can limit the number of emails customers will receive during a given campaign or program. You can enable this under **Settings > Rules and Models > Cross-Campaign Rules**.

CROSS-CAMPAIGN RULES

## New

Active	<input checked="" type="checkbox"/>	Created by	* Arthur Peltier Fabrikam Inc
Company	* Fabrikam Inc	Start Date	* 8/1/2014 12:00 AM  
Name	* Maximum of 3 promotional emails in 7 days	End Date	* 9/1/2014 12:00 AM  
Program	Footwear & Apparel	Description	Footwear & Apparel (program-level rule): Maximum of 3 promotional emails in 7 days
Campaign			

**Cross-Campaign Rule Policy**

Number of email me... \* 3

Duration \* 1 weeks ▼

[Get more details in Help](#)



# plan the media for your campaign

Determine what media you want to use to promote or advertise your product. You can associate the media with a campaign, so you know the impact of what you spend.

Interval

Drag a column header and drop it here to group by that column.

<input type="checkbox"/>	Media	Description	Expense Account	Cost	Total Qty	Total Net Cost ↓	Nov-2014	Dec-2014	Time Zone
<input type="checkbox"/>	Apparel Fashion Ma...	Ads in Fashion Maga...	Media Expense	\$5.00	114	\$570.00	90	24	Centra
<input type="checkbox"/>	Daily Newspapers	Newspaper Ads	Media Expense	\$10,000.00	230	\$2,300.00	150	80	Centra
<input type="checkbox"/>	Radio Outlet	Radio Ads	Media Expense	\$100.00	300	\$30,000.00	150	150	Centra
<input type="checkbox"/>	Television Outlet	Television promotion	Media Expense	\$2,500,000.00	12	\$30,000.00	8	4	Centra
<input type="checkbox"/>	Website Outlets	Website Promotion+	Media Expense	\$1,000.00	40	\$40,000.00	20	20	Centra
<input type="checkbox"/>	Outdoor Ads Vendor	Outdoor Ads	Media Expense	\$2,500.00	30	\$75,000.00	10	20	Centra
<b>Total</b>					<b>726</b>	<b>\$177,870.00</b>			

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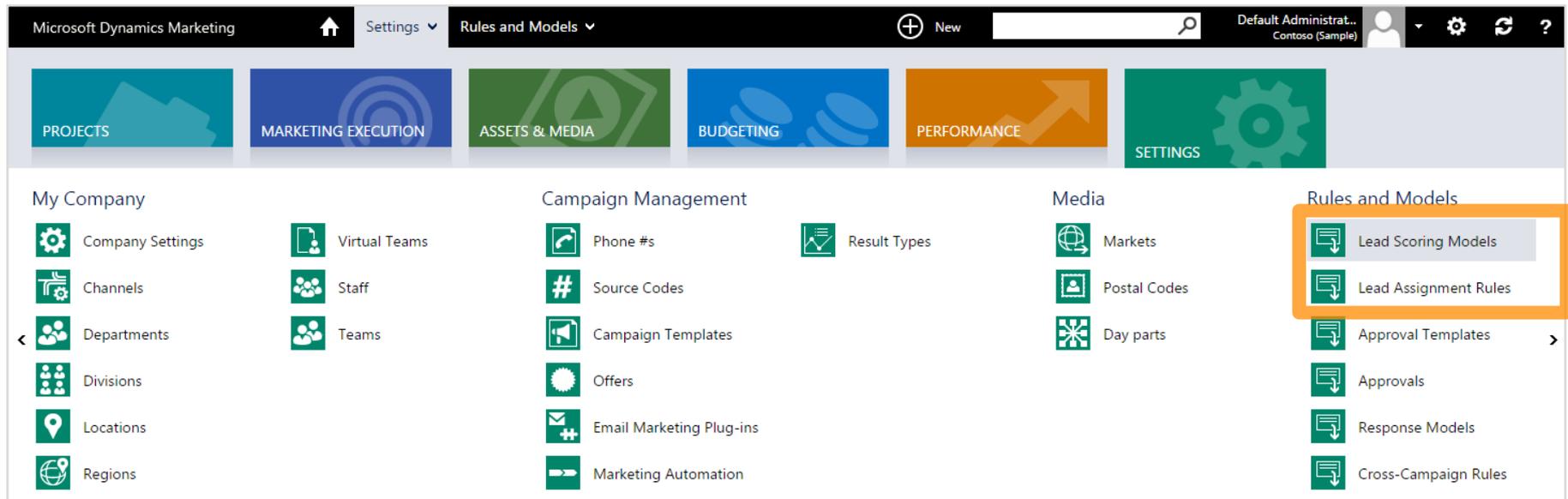




# Score and grade leads

# qualify leads with scoring and grading

Quantify intent to purchase by scoring and grading leads, and make sure the sales team doesn't waste time on people who aren't ready to buy. You'll find lead scoring rules under **Settings > Rules and Models**.



The screenshot displays the Microsoft Dynamics Marketing user interface. At the top, the navigation bar includes 'Microsoft Dynamics Marketing', a home icon, 'Settings', and 'Rules and Models'. Below this is a secondary navigation bar with tabs for 'PROJECTS', 'MARKETING EXECUTION', 'ASSETS & MEDIA', 'BUDGETING', 'PERFORMANCE', and 'SETTINGS'. The main content area is divided into several sections: 'My Company' (Company Settings, Channels, Departments, Divisions, Locations, Regions), 'Campaign Management' (Virtual Teams, Staff, Teams, Phone #s, Source Codes, Campaign Templates, Offers, Email Marketing Plug-ins, Marketing Automation), 'Media' (Markets, Postal Codes, Day parts), and 'Rules and Models'. The 'Rules and Models' section is highlighted with an orange box and contains the following items: 'Lead Scoring Models', 'Lead Assignment Rules', 'Approval Templates', 'Approvals', 'Response Models', and 'Cross-Campaign Rules'.

[Get more details in Help](#)



# identify the best leads

Score leads based on behavioral factors like responses to email campaigns, event registration, or number of website visits. Or evaluate leads based on demographic factors like company size, industry, or the person's role.

The image displays three overlapping 'New Rule' configuration windows, each showing a different set of criteria for lead scoring. Each window has a 'Condition' section and an 'Action' section.

- Leftmost window:**
  - Condition:** Field: \* Landing Page (dropdown), Any (dropdown); Where: \* For Each Submission (dropdown).
  - Action:** Update score with: \* (input field); Devaluate By: (input field) Points (input field); Score Range: Min (input field) 0 (input field) Max (input field).
  - Buttons: Submit, Cancel.
- Middle window:**
  - Condition:** Field: \* Email Message (dropdown), Is In Set (dropdown); Values: \* Event invite x (input field); Start typing or press the Down Arrow key (text); Where: \* For Each Click (dropdown).
  - Action:** Update score with: \* (input field); Devaluate By: (input field) Points (input field); Score Range: Min (input field) 0 (input field) Max (input field).
  - Buttons: Submit, Cancel.
- Rightmost window:**
  - Condition:** Field: \* Event (dropdown), Any (dropdown); Where: \* For Each Registration (dropdown).
  - Action:** Update score with: \* (input field) 10 (input field); Devaluate By: (input field) Points (input field) (dropdown); Score Range: Min (input field) 0 (input field) Max (input field) 100 (input field).
  - Buttons: Submit, Cancel.

[Get more details in Help](#)



# define when a lead is ready to buy

Control which leads are passed to your sales team by setting the score needed to flag a lead as "sales ready."

Grades + 🗑️ ↻ ↺

<input type="checkbox"/>	Grade	From	To	Sales Ready Grade
<input type="checkbox"/>	Super lead	100	120	Yes
<input type="checkbox"/>	Good lead	80	99	Yes
<input type="checkbox"/>	Ready lead	50	79	Yes
<input type="checkbox"/>	Nurturing lead	10	49	No
<input type="checkbox"/>	First contact	0	9	No

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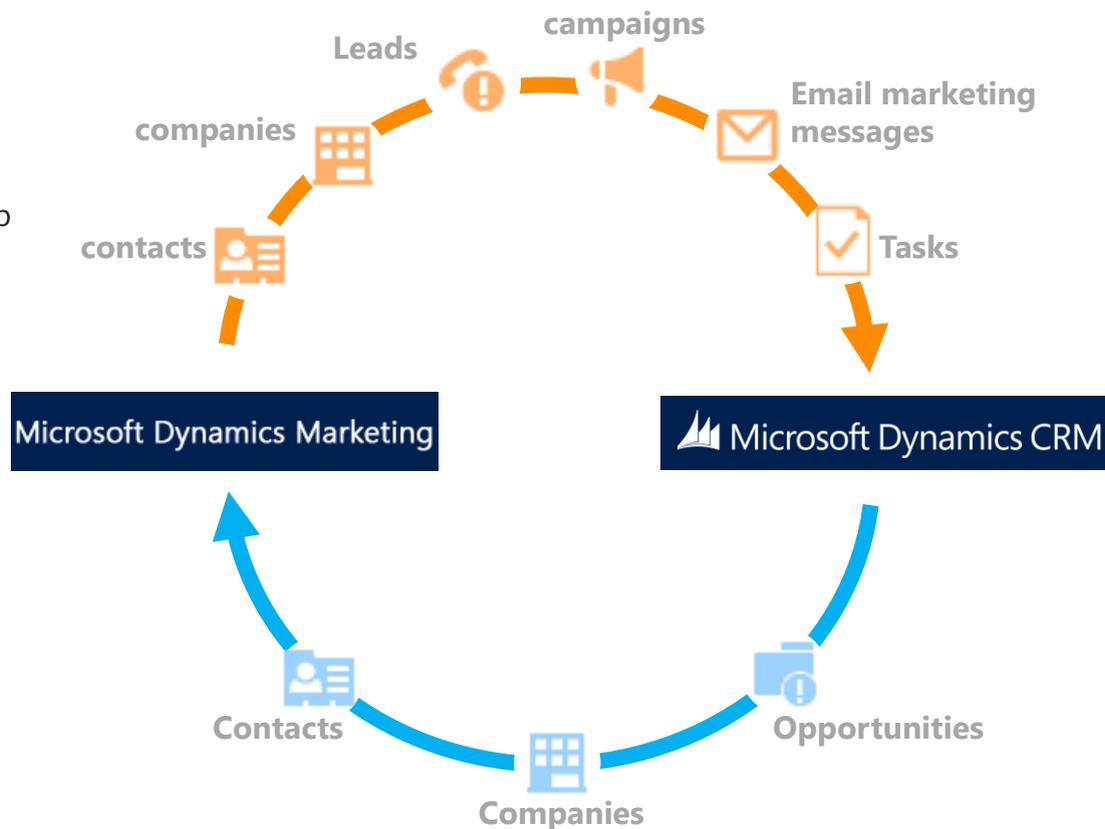


Sync and share info

# sync data with Microsoft Dynamics CRM

Have the marketing and sales teams work on the same information by syncing accounts, contacts, leads, and campaigns between Microsoft Dynamics Marketing and CRM.

Marketers can use data from the sales team to pursue activities that help move leads forward



A sales team can use the data from marketers to focus on the prospects that are most likely to result in sales

[Get more details in Help](#)



# collaborate with your marketing team

Share files and marketing assets with your team, and route approvals to put campaigns together quickly. You'll find tools to track and manage assets, media, and more under **Home > Assets & Media**.

Design an automated approval workflow

APPROVAL REQUEST  
Creative review (Approval)

Library Properties Status

- Approval
  - Reviewer
  - Group Review
- Action Type
  - Email
  - Task
  - Scheduler
- Response
  - Trigger

ID #	Name	Image	Site Favorite	My Favorite	Description	Asset Type	Size
1079	Arrow.jpg					JPG	3.56
1042	download.jpg					JPG	9.47
1184	Helene Segara.jpg					JPG	37.64
719	logo-1g-1x.png					PNG	1.63
990	Picture1.jpg					JPG	22.12
996	Picture1a.jpg					JPG	57.19
991	Picture2.jpg					JPG	21.29
998	Picture2a.jpg					JPG	34.43
992	Picture3.jpg					JPG	27.93
993	Picture4.jpg					JPG	26.71
994	Picture5.jpg					JPG	41.96
999	Picture5a.jpg					JPG	63.74
995	Picture6.jpg					JPG	19.19
1030	Recycle Hero.jpg					JPG	
708	template1-image1.jpg					JPG	117.89
709	template1-image2.jpg					JPG	70.65
1000	template3-image1.jpg					JPG	68.99

Manage, review and share digital media assets

[Get more details in Help](#)



# collaborate with your sales team

Salespeople working in Dynamics CRM can be even more effective when they know exactly which marketing communications are reaching their sales contacts. And because they know their contacts best, CRM users can even sign into Dynamics Marketing to add or remove individual contacts to or from campaigns.

The screenshot displays the Microsoft Dynamics Marketing Accounts Seller Portal. The interface includes a top navigation bar with 'Marketing Execution' and 'Marketing Database' menus, a search bar, and a user profile for Jonathon McGuire. The main content area is titled 'Accounts Seller Portal' and features a calendar view for the week of September 29 to October 27. The calendar shows several active campaigns: 'Working Green Campaign' (blue bar), 'B2B Lead Generation Campaign' (green bar), 'Annual Entertainment Expo Campaign' (yellow bar), and 'Partner Conference Campaign' (orange bar). A detailed view of the 'Working Green Campaign' is expanded, showing sub-items like 'Green Webinar Registrations', 'Green Webinar Reminder', and 'Green Webinar Details'. A left-hand sidebar lists various campaign categories, and a 'Widgets' panel is visible on the right.

[Get more details in Help](#)

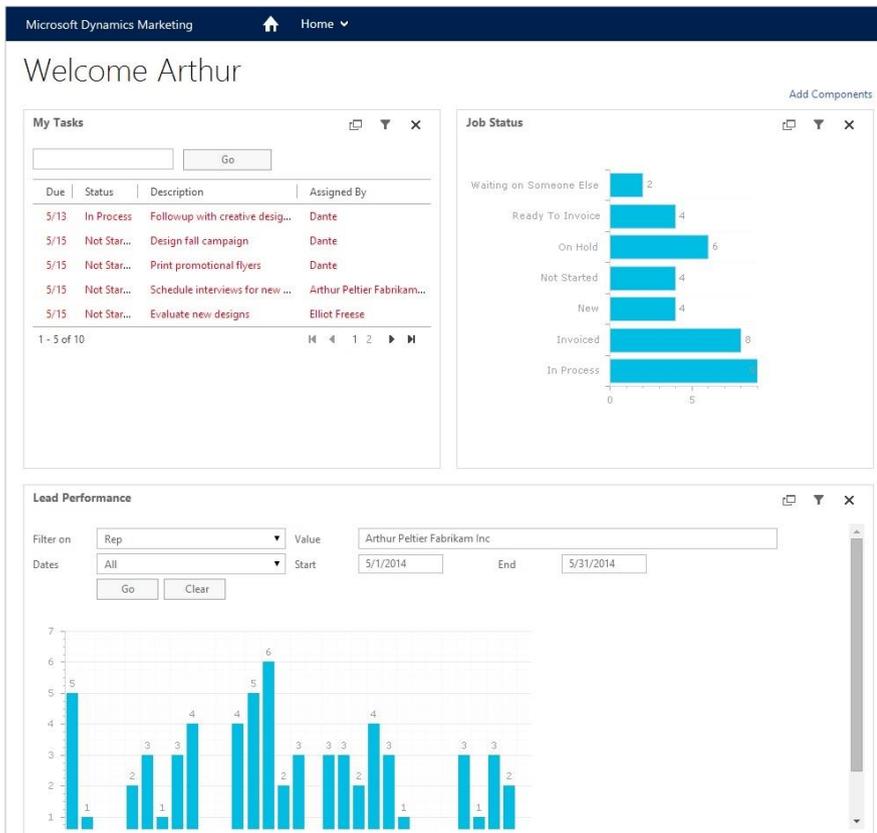




Track performance,  
ROI, and impact

# get a quick visual snapshot of your info

You can tailor your home page to show charts, graphs, and maps with the info you care about most. For example, you can see a list of tasks with their due dates, or the number of leads or opportunities you're working on.

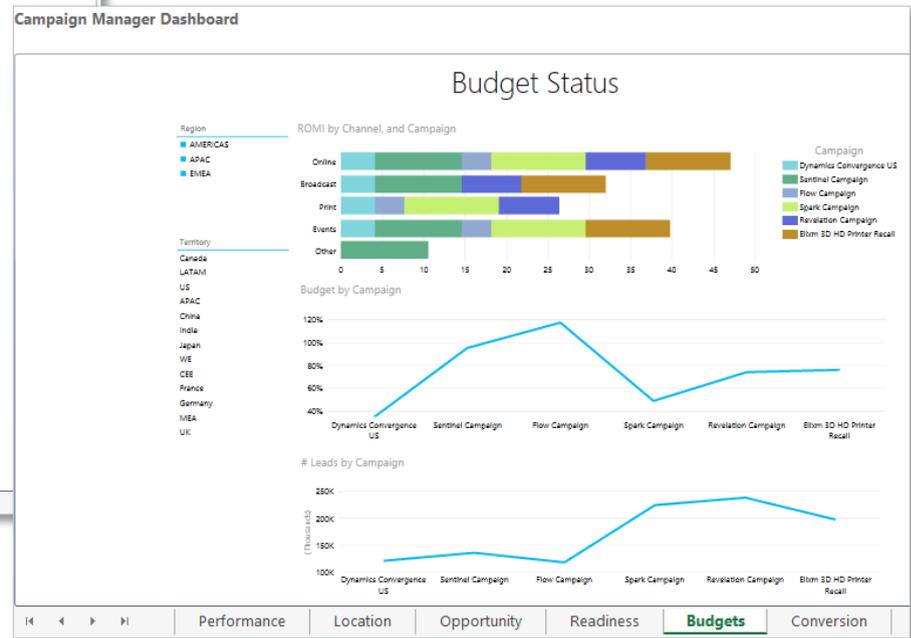
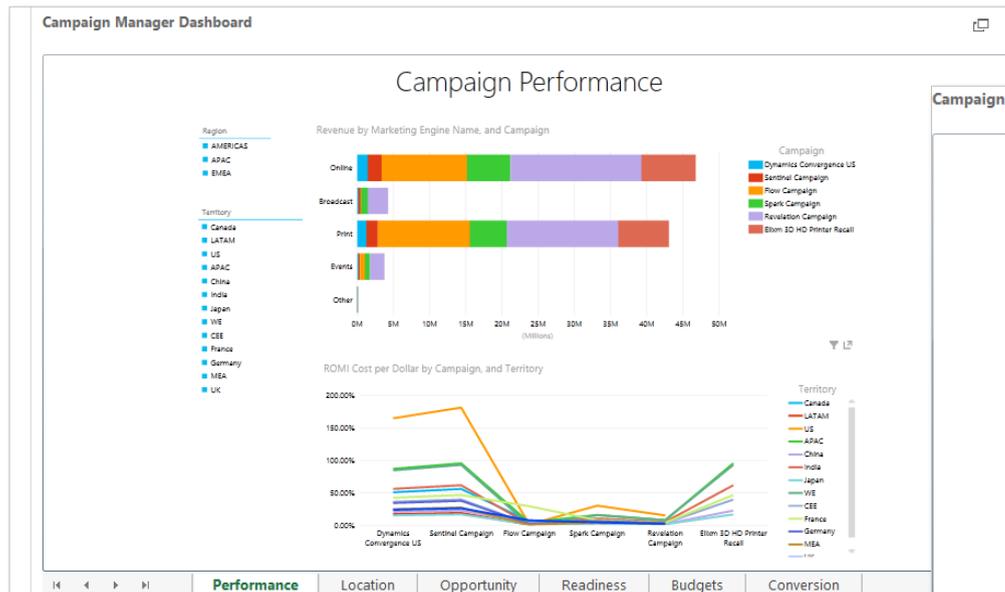


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# gain greater insights through Power BI

Get meaningful insights by using familiar Microsoft Excel tools with the help of the Power Query for Excel add-in for Microsoft Dynamics Marketing. Use the sample analytic worksheets as a starting point. Then, adapt them to monitor the performance of your marketing efforts.



[Get more details in Help](#)



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Version 16.0



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