

Increase your impact with Microsoft Dynamics Marketing

See what you can do with this
powerful marketing solution

Microsoft Dynamics Marketing



For
Marketing
Professionals

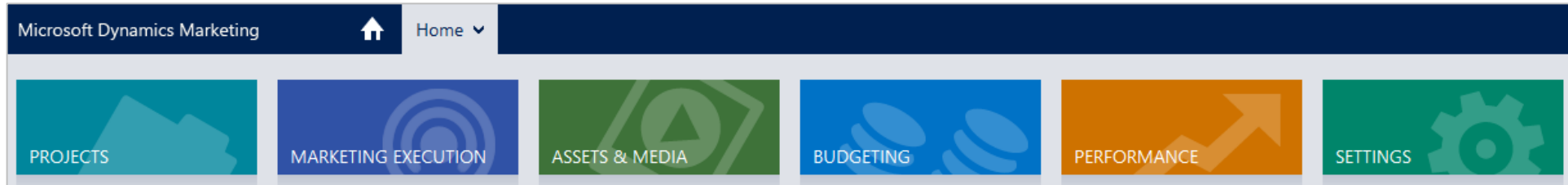
Welcome to Microsoft Dynamics Marketing!

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



navigate quickly with tiles

When you sign in, click or tap **Home** to see tiles for the marketing tasks you do every day.



Assign tasks and manage your team's projects

Here's where you'll do most of your work, like running campaigns or managing leads

Keep track of all your marketing collateral and media placements

Monitor your expenses, quotes, payments, and invoices

Get reports on your campaigns, media activities, and projects

Set up users, roles, and system settings



explore marketing execution

Under the **Marketing Execution** tile, 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 screenshot shows a dashboard with a dark blue header containing a 'Home' dropdown and a 'New' button with a search icon. Below the header is a row of six colored tiles: 'PROJECTS' (teal), 'MARKETING EXECUTION' (purple, highlighted with an orange border), 'ASSETS & MEDIA' (green), 'BUDGETING' (blue), 'PERFORMANCE' (orange), and 'SETTINGS' (green). Underneath these tiles are seven columns of sub-tiles, each with an icon and a title:

- Campaign Management:** Campaigns, Campaign Templates, Programs, Program Templates, Fulfillment
- Marketing Database:** Marketing Companies, Marketing Contacts
- Vendors:** Vendor Companies, Vendor Contacts
- Clients:** Client Contacts, Client Companies, Contracts
- Marketing Lists:** Marketing Lists
- Lead Management:** Landing Pages, Leads, Opportunities, Opportunity Metrics, Opportunities Forecast
- Marketing Plans:** Marketing Plans

[Get more details in help](#)



build campaigns with the drag-and-drop visual designer

Create a campaign by dragging and dropping activities to a canvas, and arranging them in the order you want them to happen. Here we're sending a weekly email newsletter to a dynamic marketing list.

You'll find the campaign visual designer under **Marketing Execution > Campaign management > Campaign.**

The screenshot shows the 'CAMPAIGN' visual designer for 'Health Corp - Hospital Onboarding campaign'. The interface includes a top navigation bar with 'Summary' and 'Automation' tabs. The main canvas displays a sequence of activities: 'Recurring', 'Write weekly communica...', 'Hospital Onboarding - S...', and 'Hospital Onboarding - E...'. A dashed orange arrow points from an 'Email' activity in the right-hand 'Activities' panel to the 'Hospital Onboarding - E...' activity on the canvas. The 'Activities' panel is categorized into 'Action Type', 'Marketing Lists', and 'Response'. The 'Action Type' list includes Email, Landing Page, Task, Scoring, Social Media, Edit Marketing List, Printed Mail, and Event. The 'Marketing Lists' list includes Static and Dynamic. The 'Response' list includes Scheduler and Trigger. The top right of the canvas has 'DEACTIVATE' and 'VALIDATE' buttons. An orange callout box with a white arrow points to the 'Email' activity in the panel, containing the text: 'Drag actions, lists, or responses to the canvas.'

[Get more details in help](#)







cap the number of emails people receive

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

Microsoft Dynamics Marketing lets you limit the number of emails customers can receive during a campaign or program. You do this by setting cross-campaign rules under **Settings > Rules & Models**.

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 ▼



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.

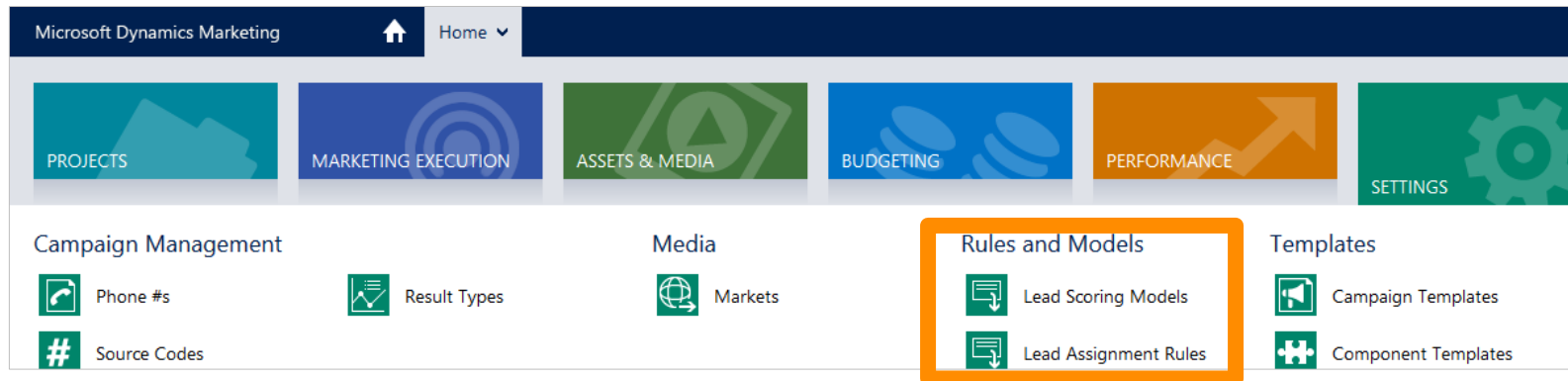
<input type="checkbox"/>	Media	Description	Expense Account	Cost	Total Qty	Total Net Cost ↓	Nov-2014	Dec-2014	Time Z
<input type="checkbox"/>	Apparel Fashion Ma...	Ads in Fashion Maga...	Media Expense	\$5.00	114	\$570.00	90	24	Centra
<input type="checkbox"/>	Daily Newspapers	Newspaper Ads	Media Expense	\$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
Total					726	\$177,870.00			

[Get more details in help](#)



qualify leads with lead 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 dashboard. At the top, there is a navigation bar with 'Microsoft Dynamics Marketing' and a 'Home' dropdown menu. Below this is a row of six main category tiles: PROJECTS, MARKETING EXECUTION, ASSETS & MEDIA, BUDGETING, PERFORMANCE, and SETTINGS. The 'SETTINGS' tile is highlighted in green. Underneath the 'SETTINGS' tile, there are four sub-sections: 'Campaign Management' (with 'Phone #s' and 'Source Codes'), 'Media' (with 'Markets'), 'Rules and Models' (highlighted with an orange border, containing 'Lead Scoring Models' and 'Lead Assignment Rules'), and 'Templates' (with 'Campaign Templates' and 'Component Templates').

[Get more details in help](#)



identify the best leads

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

New Rule

Condition

Field * Web Site Is In Set

Values * Pricing

Where * For Each Visit

Action

Update Score With : * 10

Devalue By 2 Points Weekly

Score Range Min Max

New Rule

Condition

Field * Landing Page Is In Set

Values * Webinar Registration

Where * For Each Submission

Action

Update Score With : * 20

Devalue By 2 Points Weekly

Score Range Min Max



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

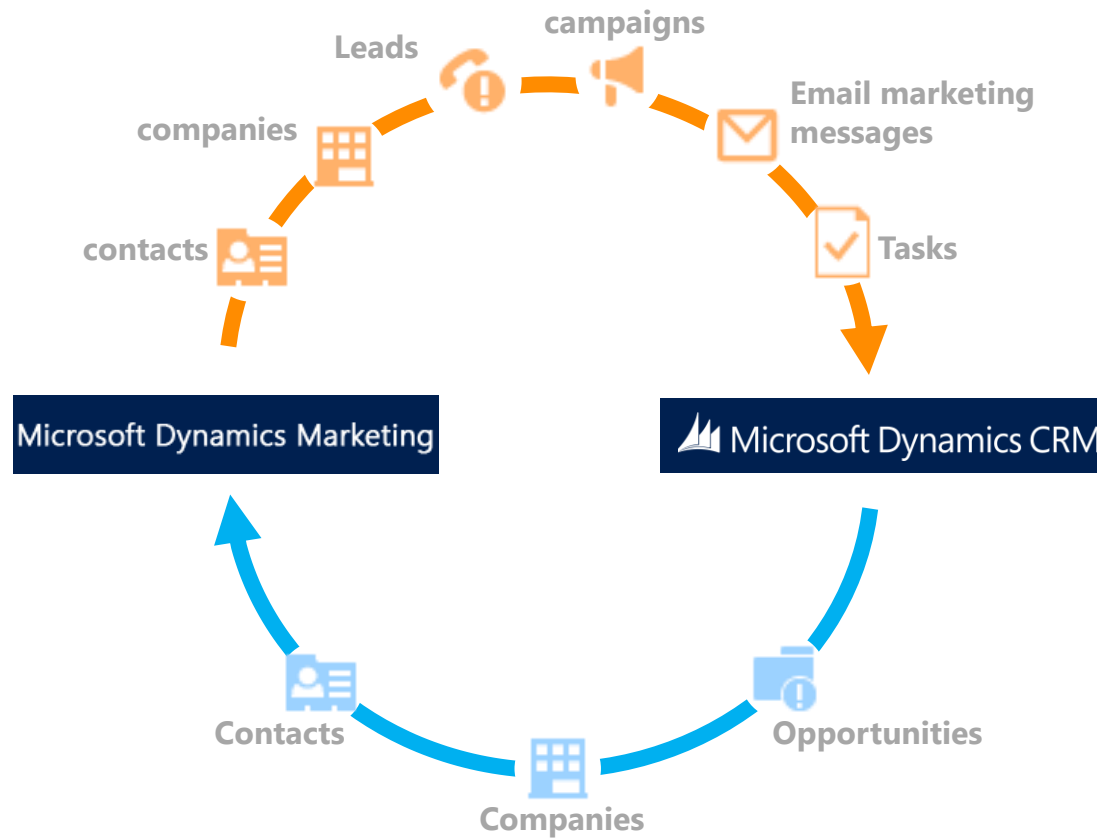
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sync data with Microsoft Dynamics CRM

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 and share with your 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**.

APPROVAL REQUEST

Creative review 100014 (Review)

Priority: Normal | Due: 4/1/2014 6:17 PM
Status: Not Sent | Status Date: 3/23/2014 3:46 PM
Request: Creative review 100014 | Reminder:
Routing: Concurrent | Request Date: 3/23/2014 3:46 PM
Custom # of Pages:
Thumbnails: 1 | Completed Date:
Job:
Type: Approval Review | Requested By: Campaign Manager Proseware 3D
Restrict Comments:
Instructions:

Contacts

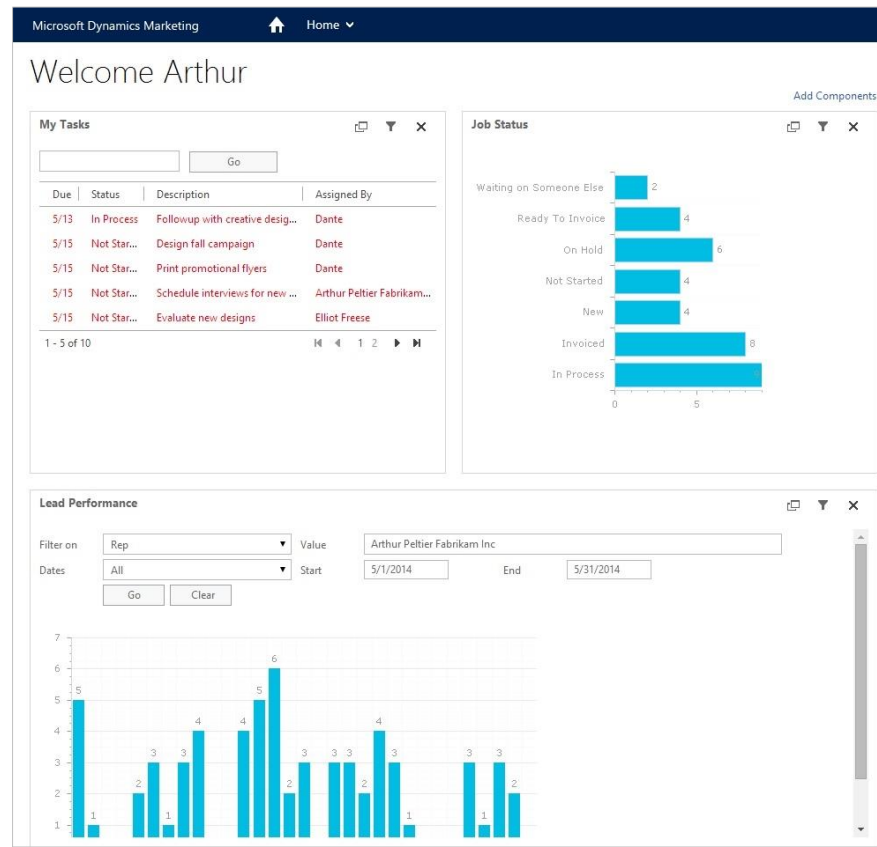
<input type="checkbox"/>	Name	Status	Start Date	Completed Date
<input type="checkbox"/>	Graphic Designer Proseware	Not Sent		
<input type="checkbox"/>	Content Marketer Proseware	Not Sent		
<input type="checkbox"/>	Marketing Project Manager f	Not Sent		
<input type="checkbox"/>	Brand Manager Proseware 3i	Not Sent		
<input type="checkbox"/>		Not Sent		
<input type="checkbox"/>		Not Sent		
<input type="checkbox"/>		Not Sent		
<input type="checkbox"/>		Not Sent		

[Get more details in help](#)



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.



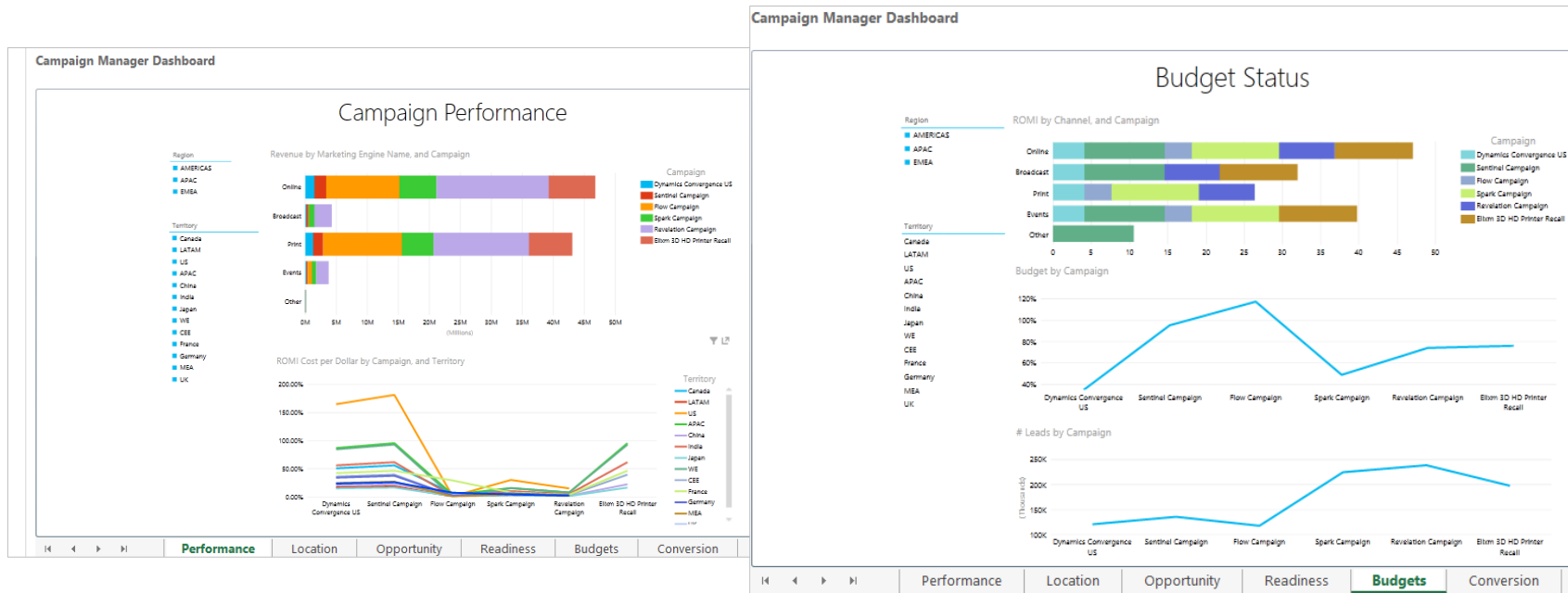
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gain greater insights through Power BI

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.



Thanks for reading!

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We'd love to know what you think.

[Marketing Help Center](#)

Version 16.0



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