

## LinkedIn Integration AppSource offering: Implementation and training

### Title:

LinkedIn integration with Dynamics 365: 3 days' implementation and training.

### Offer summary

Enrich data, create and manage new connections by integrating the largest professional social network and Dynamics 365. In 3 days, we deliver a complete integration and fully train your users.

### Offer description

Enhance your sales opportunities and optimize marketing processes by benefitting from the enormous reach and network LinkedIn offers to your organization.

The LinkedIn integration helps you to combine your CRM data with the best of LinkedIn data that are enclosed in the social networks of your organisation. Get key-profile information, insights in connections and activity information in one single point to thrive optimal relation management and experiences. Foster appealing dialogues in business development, keep your data accurate and create tailored marketing campaigns by the consolidation of LinkedIn and Dynamics 365.

In three days, we deliver a full integration and help you to infuse LinkedIn information in Dynamics 365, design and-set up sales and marketing processes and train your users to use the product.

### Deliverables

#### *Dynamics 365 Sales:*

- Broaden your network: Infuse the network of your organisation into Dynamics 365 to get insights about prospects with LinkedIn Sales Navigator.
- Capture data easily: Use Lead Gen Forms to capture data gathered by LinkedIn campaigns directly in Dynamics 365.
- Enhance sales performance: Receive icebreakers and discover key decision makers across sales opportunities.
- Enrich insights: Combine LinkedIn profile information, activities and messages with your CRM information.

#### *Dynamics for Marketing:*

- Manage social posts: Manage social media posts in one platform through an integrated marketing agenda.
- Identify and target audiences: Compose segments inside Dynamics and target them with your LinkedIn campaigns using Matched Audiences.
- Automate LinkedIn campaigns: Integrate LinkedIn campaigns into campaign automation flows to follow up with email and nurture flows.

### Prerequisites

- LinkedIn Sales Navigator Team or LinkedIn Sales Navigator Enterprise.  
*Dynamics 365 Sales*
- LinkedIn company account.  
*Dynamics for Marketing.*

# Screenshots (max 5)

**Dynamics 365** | Sales Hub | Sales > Accounts > Microsoft Corporation | Chris Stedman

**Microsoft Corporation**

Summary | Details | Related

Account Name: Microsoft Corporation  
Coyote Status: Active New  
Customer Size: Zebra

**SALES NAVIGATOR** | Profile | Connections | More

**Microsoft**  
Computer Software  
10001+ employees · United States  
See all 149,332 employees on LinkedIn →

Enter a note...

LAST WEEK

Email from Chris Stedman - Thursday, May 9, 2019 8:01 PM

Important Email! CRM:0001005  
You should read this and open the attachment- it's very important!

pricing.pdf

Assign | Delete | ...

Sent May 09 8:01 PM · Not yet opened

Appointment from Chris Stedman - Friday, May 10, 2019 8:30 AM

Review Proposal

No Activity with Opportunity  
**New Lead**  
There's been no activity with this opportunity since Friday, March 8, 2019.  
Open Opportu... | Send Email

Opportunity Closing Soon  
**Acquisition and Merger Assi...**  
Opportunity closes on Friday, May 24, 2019.  
Open Opportu...

Primary Contact

**Dynamics 365** | Sales Hub | Sales > Leads > Nick Fratello | Molly Clark

Lead: All for Sales | Lead source: Web | Rating: Warm

**Nick Fratello**

Lead to Opportunity Sale... | Active for 4 months | Quality | Develop (3 Mo) | Propose | Close

Summary | Relationship Analytics | Details | Related

**CONTACT**

**SALES NAVIGATOR** | Profile | Icebreakers | More

**Nick Fratello**  
Dynamics 365 Technical Solutions Professional  
Greater Boston Area  
2900 connections  
65 shared connections

Current  
Dynamics 365 Technical Solutions Professional at Microsoft · 6 yrs 3 mos +1 more

Previously  
Partner Technology Advisor at Microsoft

Education  
Babson College - Franklin W. Olin Graduate School of Business · 2004 - 2006

Save in Sales Navigator

Enter a note...

What you missed (Click To Filter)  
New activities (1)

LAST WEEK

Task modified by Molly Clark - Tuesday, May 7, 2019 10:05 AM

Follow Up

Assign | Delete | ...

OLDER

Task completed by Molly Clark - Tuesday, April 16, 2019 9:25 PM

Submit approval request

**SALES NAVIGATOR** | Profile | Connections | More

Your 1st degree connections (144)

**Kate Johnson** - 1st  
President, Microsoft US  
Message

Your TeamLink connections (112,735)

**Ira Gupta** - 3rd  
Head Of Human Resources, India  
View TeamLink

Your 2nd degree connections (21,866)

**Kathleen Hogan** - 2nd  
Chief People Officer  
View Profile

### Describe the offer you're promoting

Offer headline

Sign up for our webinar! 16

Offer detail

Come learn about how we can help your business. 113

Privacy policy URL

http://www.example.com/privacy-policy

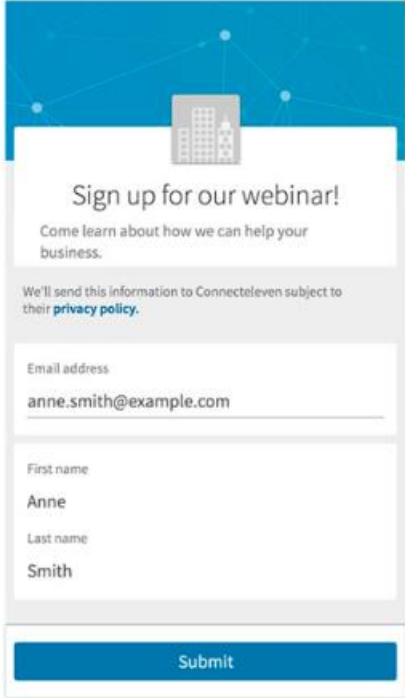
+ Add a custom privacy policy text (optional)

### Select the lead info you want to collect (7 maximum)

Profile information (will be pre-filled from the member's profile)

Contact

- First name
- Email address
- Phone number
- City
- State/Province



The preview shows a blue header with a building icon. The main text reads 'Sign up for our webinar!' followed by 'Come learn about how we can help your business.' Below this is a privacy notice: 'We'll send this information to Connectelevelen subject to their privacy policy.' The form includes fields for 'Email address' (filled with 'anne.smith@example.com'), 'First name' (filled with 'Anne'), and 'Last name' (filled with 'Smith'). A blue 'Submit' button is at the bottom.

Dynamics 365 > Marketing > Form Submissions > LinkedIn Form Submission

LINKEDIN FORM SUBMISSION

Status: Active | Owner: SYSTEM

General

LinkedIn account	504275001
LinkedIn campaign ID	50
Customer Journey	---
LinkedIn Creative ID	160
LinkedIn Lead Gen Form	TestFormCrm
Type	Sponsored
Lead	Debra
Submission date	3/19/2018 9:17 AM
Matching status	New lead created

LinkedIn Form Submission Answers

LinkedIn question	Answer text	Created On
Custom Question 0	fb dlvk iuahddvpxp l yyfs	3/19/2018 9:26 AM
Custom Question 1	Two	3/19/2018 9:26 AM
Company name	Zooxo	3/19/2018 9:26 AM
Gender	female	3/19/2018 9:26 AM
Email address	draycm@squarespace.com	3/19/2018 9:26 AM
First name	Debra	3/19/2018 9:26 AM
Job title	Analog Circuit Design manager	3/19/2018 9:26 AM

Dynamics 365 > Marketing > Social posts

SANDBOX

social posts

september 2019

zondag	maandag	dinsdag	woensdag	donderdag	vrijdag	zaterdag
sep 1	2	3	4	5	6	7
8	9	10 3:20pm Testing	11 6:10am Nieuwsbrief	12	13	14
15	16	17	18	19	20	21

