



Microsoft Dynamics 365

Personalized Customer Experience to Increase Demand Dynamics 365 Marketing: 2-Wk Implementation/Training

Dynamics 365 offers marketing automation for companies looking to increase demand with personalized customer journeys across multiple channels. Realize operational advantages and reduced costs when aligning sales and marketing with an integrated solution on the same platform.

Deliverables:

Covenant will assist with the installation of Dynamics 365 Marketing in up to two environments (Production and Sandbox).

- Marketing App setup and configurations
- Create new Segments - Dynamic and Static
- Create new Subscription Lists
- Create new Call template, Task template, and Appt. Template
- Create new Content Block
- Add content to Library
- Update Subscription Center Form and Subscription Center Page, and setup Form Fields
- Create new Marketing Email Template
- Create new Marketing Email
- Create new Customer Journey
- Set up Social Media Accounts
- Create social media post
- Lead Scoring Model
- Create new Event for hosting or tracking
- Copilot capabilities in Marketing Email and Segments
- Review Marketing Email Analytics
- Review Customer Journey Analytics
- Review Contact Insights
- Review Account Insights



Summary of Key Capabilities:

- Multi-channel campaigns
- Lead nurturing
- Event management
- Customer Voice
- Insights and reporting
- Unified platform
- AI capabilities
- Social platform integration



For more information please contact Margaret Mundt at MMundt@mailctp.com.