

minsoit

An Indra company

# Quick Start Pack

Dynamics 365 Marketing



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# 01



Minsait, your  
technological  
Partner

# Who we are

Indra is currently the **leading technology in Spain** and one of the **main in Europe and Latin America**

## Business Consulting

## Technology

## Digital Solutions

3.043 M€ sales

+49.000 Professionals

Projects in +140 countries

Local presence in 46 countries

50% sales abroad

(2020 Data)



**16%**  
Energy and Industry

**11%**  
Telecom and Media

**17%**  
Financial services

**18%**  
AA.PP. and Health

**17%**  
Security and Defense

**21%**  
Transport and Traffic

### Business Management Systems

- ERP Solutions
- Payroll and Human Capital
- Consolidation and budgeting

### Advanced Technologies

- Business Consulting
- Technology
- Digital Solutions

### Outsourcing y BPO

- User Management
- Application Maintenance
- Infrastructure Management

### Paradigma

- Agile Projects

### Cybersecurity



- Digital Risk
- CyberSec Services & Solutions
- Digital Identity and Signature



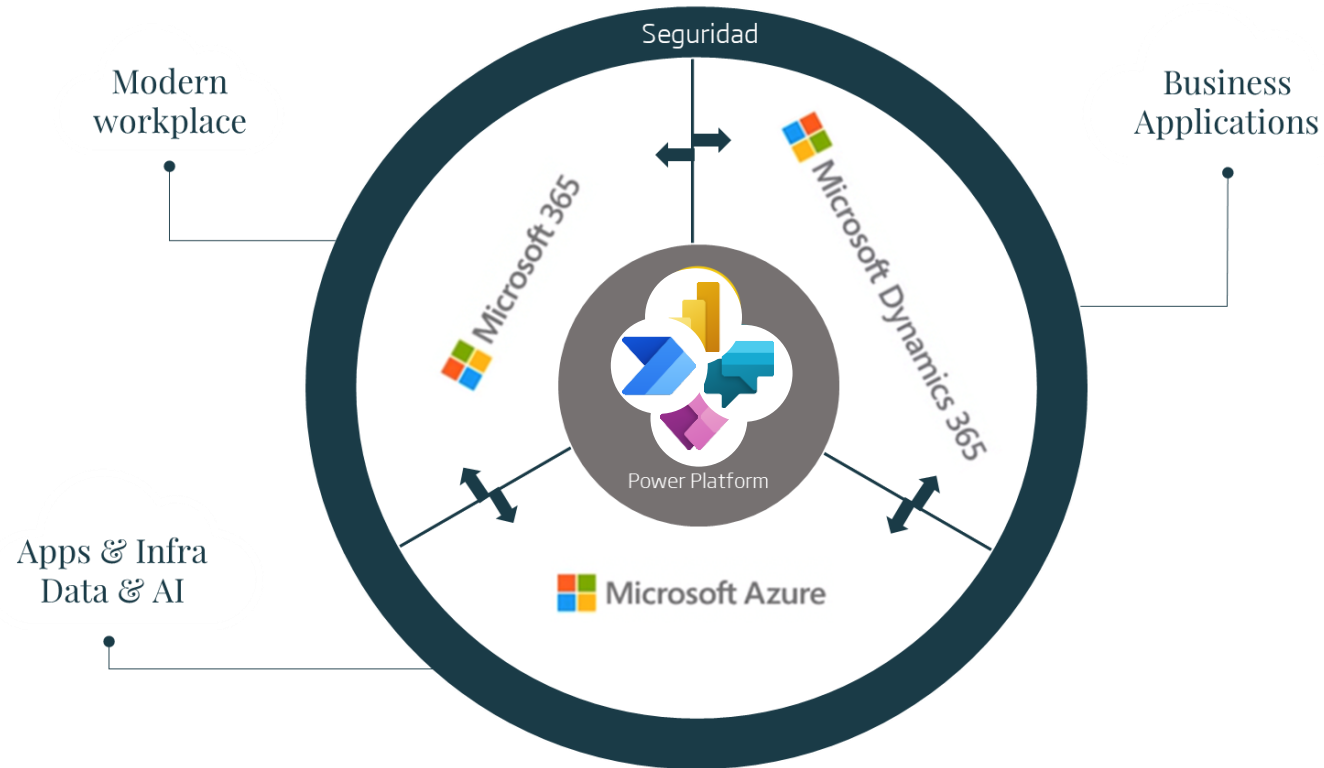
# 02



Our vision and  
capabilities

Our vision and capabilities

# Committed to thinking about the world through platforms and ecosystems



We approach our projects with a holistic and integral vision of the Microsoft Platform, with the perspective of Dynamics 365 as a core system but using the entire ecosystem of **Microsoft solutions as a platform to extend its capabilities**



## Modern workplace

Productivity  
Collaboration  
Communication  
Culture



## Business Applications

Value creation  
Efficiency  
Profitability  
Scalability



## Apps & Infra Data & AI

Proactivity  
Creativity  
Competitiveness  
Adaptation

Our vision and capabilities

# We ensure the quality of the service thanks to the certifications that accredit us...



Partner of the year 2021  
Data&AI Power Platform

Advanced Low Code  
Specialization



**+1.000**

Professionals with  
specialized knowledge



**+250**

Data & Analytics Experts



**+300**

CRM & ERP experts



**+230**

Experts in Infra & Apps



**+120**

Power Platform  
Experts



**+15**

Professionals accredited  
as Microsoft Certified  
Trainer



**+100**

Digital Workplace & M365



**+1.000**

Projects

**+500**

Clients

**+12**

Geographies



**+300**

Digital transformation projects  
in progress

**Microsoft Azure Advanced  
Specialization: Windows Server and  
SQL Server Migration**

Demonstrate our expertise in migrating and  
optimizing Windows Server and SQL Server-  
based production workloads to Azure.



**+20**

Years of experience



# 03



Quick Start pack  
Dynamics 365  
Marketing



# 3.1. Our approach

# Why you might need a Quick Start Pack?

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Dynamics 365 Marketing is a solution with enormous potential and many functionalities. But if your company does not need all the capacity **to start the path of Marketing Automation**, then an approach “**first adopt, then scale**” will be your best ally in digital transformation.

We propose a **rapid implementation** of the standard functionalities slightly **adapted to your business needs** to achieve an agile digitization of the marketing processes ensuring a **scalable solution aligned with product innovation**

# Quick Start Pack Key Benefits

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1

Goals  
Oriented

We **consider** your **context** and **changing needs** of your business to take advantage of the transforming power of the business itself, making **common objectives** between the project and business team

2

Keep it simple!

To grant a **rapid deployment** we keep focus on **simplicity** and **efficiency** for all aspects of the project, identifying short-term **quickwins** that will define the roadmap of your solution

3

Embrace  
innovation

A **successful implementation** capable of scaling **aligned** with **product innovation roadmap**, guarantees the **quality** of the technical approach and minimizes the impact of changes

# Dynamics 365 Marketing full overview

At Minsait, we combine creativity, innovation and technology to **turn leads into business relationships**

## Business impact

### Efficiency

Reduce time and margin of error by automating tasks performed in digital marketing strategies



### Conversion

Identify each action according to lead scoring of potential customers to optimize lead nurturing tasks and get more conversions

### Awareness

Improve the relevance of campaigns and traffic to **Impact more** by generating **qualified leads** of better quality



### Upsell clients

Create up-selling, cross-selling scenarios and **increase recurrence**



### Engagement

Increase interactions to **expand** sales opportunities and **reduce the cost** of attracting leads



### Life-time-value

**Increase** the net value of the **income** generated by a **customer** with fluid experiences and without breakouts that work for **loyalty** and **recommendation**

CX Marketing  
by Minsait 

## Features

### Content creation

Templates and A/B testing to control content effectiveness

### Comprehensive online/ offline event management

no code needed

### Social Media Marketing

Planning and publication of content in RRSS (Facebook, LinkedIn or Twitter)

### Social listening

Add relevant tags to the journey, events, and other entities

### Customer Journey

Segment and orchestrate personalized experiences

### Email Marketing

Automation of sending personalized e-mails and autoresponders according to journey

### Landing pages

Landing pages and web forms for lead capture

### Lead nurturing

Personalized content marketing to potential customers

### Marketing Analytics

Assist in measuring impacts in each action

### Mobile marketing

SMS y MMS



Marketing



Customer Insights

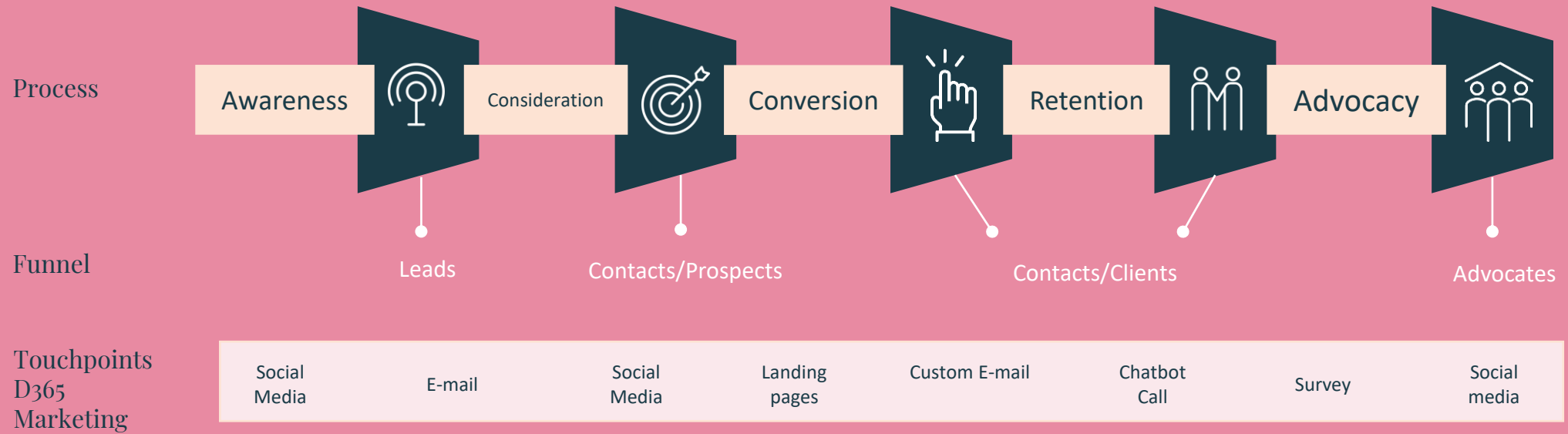


Customer Voice



Power Virtual Agent

# The standard end-to-end D365 Marketing cycle



Automate the actions of marketing strategies with a 360 view of the customer, using data responsibly to create **personalized and connected digital experiences**

# What is the scope of a D365 Marketing Quick Start Pack?



Duration: 4 weeks

Total Amount: 21,200 €

## Initial setup



Within the scope of the project, the parameterization of the Contact, Potential Client and Events entities will be carried out, customizing the existing fields and views based on the needs collected during the analysis.

GDPR and subscription lists will be configured.

Domain authentication will be performed to those provided.

The Type of Content and Brand will be generated for the correct functioning of the tool.

Up to 5 master tables and two custom tables will be created and customized

## Training



Two training sessions (workshops) will be held with the Key Users in which the following contents will be addressed:

- Basics of Dynamics 365: navigation, searches and creating/modifying records
- Creation of an Email, a Form and a Landing Page
- Create a dynamic segment
- Scheduling two social media posts
- Create an Event template

## Smart marketing



The following creatives will be created in the scope of the project:

- Create three segments
- Creation of an Email template.
- 3 Customer Journeys will be parameterized within those defined in the analysis phase.

## Users and roles



Create users in Azure Active Directory.

Creation, configuration and assignment of up to 2 additional user roles to the standard ones.

## Social Media



The accesses to the following Social Networks that apply within the following will be configured:

- Facebook
- Instagram
- Twitter
- LinkedIn

## Event management



The Event entity will be customized with the fields defined during the analysis.

## 3.2 Planning

# How do we work?

Our methodology raises **4 workstreams** that cover all the necessary activities to ensure the success of the implementation

## Line A | Analysis, design and implementation



We propose an implementation strategy supported by workshops to **validate the approach and build an incremental solution**

## Line C | Change management



At Minsait we have our own change management methodology under adaptive methodologies

## Line B | User validation



The **participation and commitment** of the client is key to ensure an implementation that meets expectations. To comply with these Minsait will generate a **test plan and UATs** that the client must execute to validate the implemented solution.

## Line D | Strategy and governance

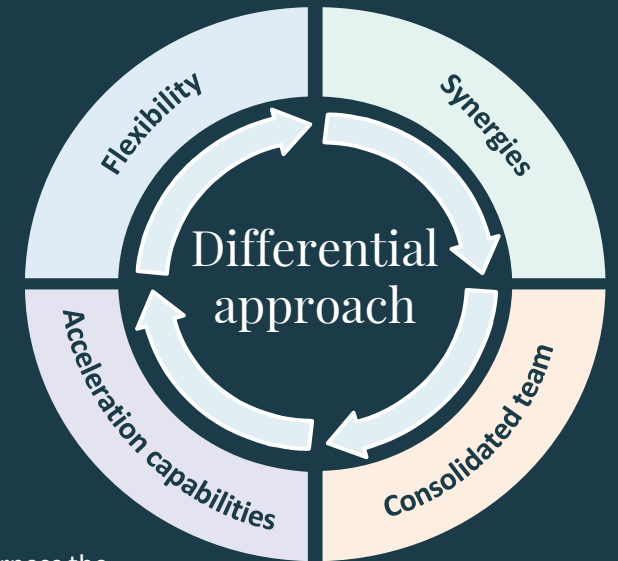


A successful implementation requires a **deep knowledge of the client's needs** and an **evolution strategy**

# What sets us apart

The teams and skills involved will be adapted according to the priorities of the moment

We take advantage of working with different technologies and industries

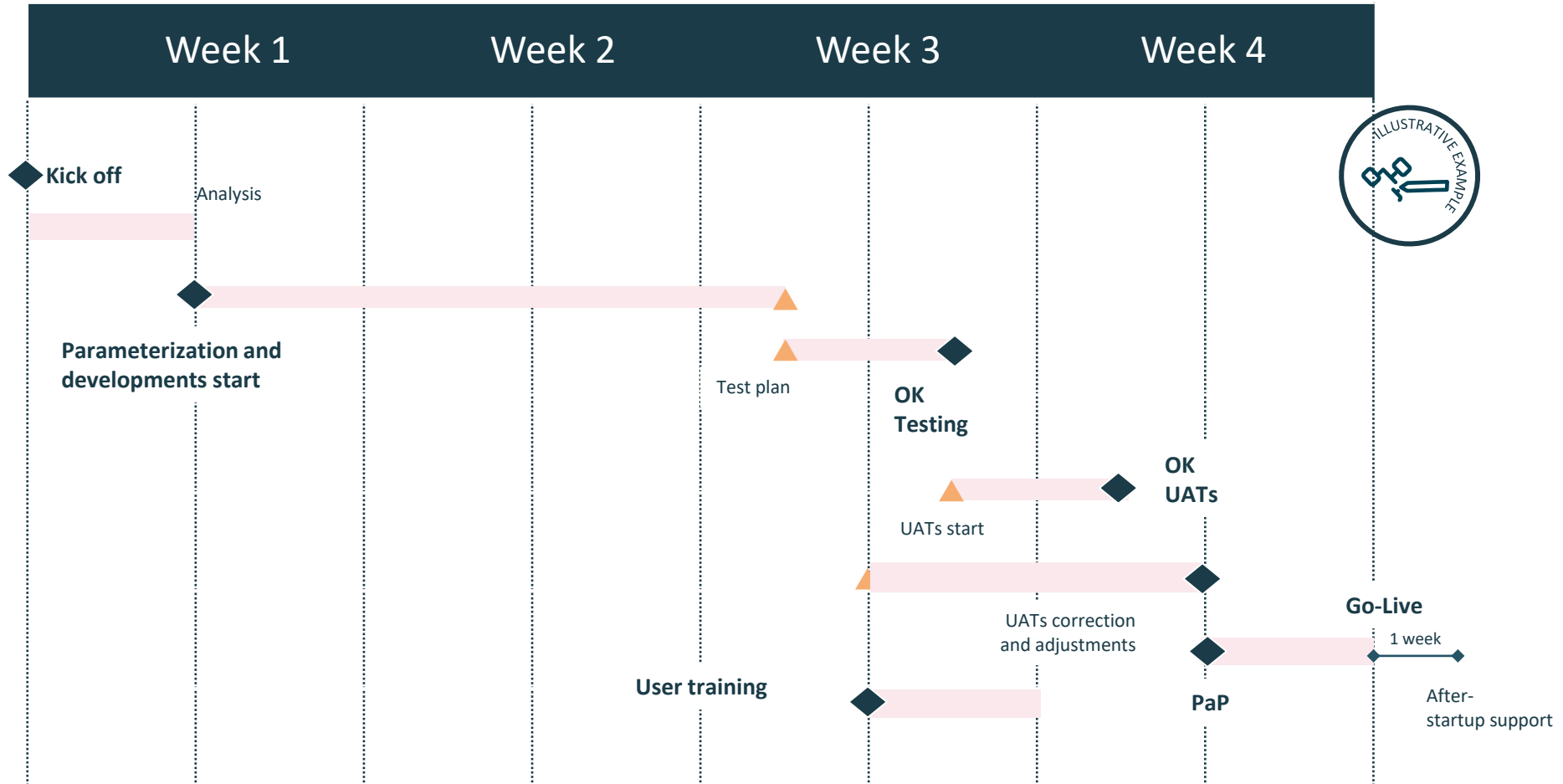


We harness the transformative power of the business itself

Specialized teams that collaborate in a multidisciplinary way



# The 4 workstreams flow in a coordinated way to ensure the success of the project



# Thanks!

minsait

Mark Making the way forward

An Indra company