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50 Tips in 50 minutes: Dynamics 365 Customer Insights — Journeys







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والأفيالية الشرائية والتشايين والأفيالية فيفتح البؤلان





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Agenda

- Emails
- Segments + Triggers
- Forms
- Journeys
- Consent
- CIJ Roadmap
- Resources



Now, the Tips



1. Say yes to (some) Copilot.





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- 2. Maximize your brand profiles.



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- 3. More hops = more data. Use it!



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- 1. Say yes to (some) Copilot.
- 2. Maximize your brand profiles.
- 3. More hops = more data. Use it!
- 4. Get hyper-personal with conditional content.
- 5. Edit emails in live journeys.





6. Leverage advanced analytics.





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- 7. Download Links are available.



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- 8. Take advantage of Themes and custom font upload.



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- 7. Download Links are available.
- 8. Take advantage of Themes and custom fonts.
- 9. More than one contact point data source.

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Compliance profile:

- 6. Leverage advanced analytics.
- 7. Download Links are available.
- 8. Take advantage of Themes and custom font upload.
- 9. More than one contact point data source.
- 10. Protect your HTML and data.



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11. Choose your fighter trigger.

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- 11. Choose your fighter trigger.
- 12. Not seeing your related table? There's a sync for that.



- 11. Choose your fighter trigger.
- 12. Not seeing your related table? There's a sync for that.
- 13. Pick a date, any date...



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- 14. Make your segment edits before using in journeys.



- 11. Choose your fighter trigger.
- 12. Not seeing your related table? There's a sync for that.
- 13. Pick a date, any date...
- 14. Make your segment edits *before* using in journeys.
- 15. Give natural language some time.



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16. Export larger segments. Up to 750k!





- 16. Export larger segments. Up to 750k!
- 17. In-between operators do not move.

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- 16. Export larger segments. Up to 750k!
- 17. In-between operators do not move.

18. No estimation with behavioral.



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- 16.Export larger segments. Up to 750k!
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- 18. No estimation with behavioral.

19. Refresh road rules.



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- 16. Export larger segments. Up to 750k!
- 17. In-between operators do not move.
- 18. No estimation with behavioral data.
- 19. Refresh road rules.
- 20. Column level security requires some extra love.







Bonus:

Build journeys with more than one segment.





Forms

21. Should it be a lead? A contact? Both or Neither!



Forms

21.Should it be a lead? A contact? Both or Neither!

22. Use hidden fields to auto-set specific values.

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Real-time journeys	>				🐁 Address 1: Phone		



- 21. Should it be a lead? A contact? Both or Neither!
- 22. Use hidden fields to auto-set specific values.
- 23. See changes in real-time with "#d365mkt-nocache"



Forms

- 21. Should it be a lead? A contact? Both or Neither!
- 22. Use hidden fields to auto-set specific values.
- 23. See changes in real-time with "#d365mkt-nocache"
- 24. Speed up styling with "inherit"

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Forms

- 21. Should it be a lead? A contact? Both or Neither!
- 22. Use hidden fields to auto-set specific values.
- 23. See changes in real-time with "#d365mkt-nocache"
- 24. Speed up styling with "inherit"25. Save time with pre-fill.

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26. Templatize your forms!







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27. Custom one-time question, no problem.



Forms

26. Templatize your forms!

- 27. Custom one-time question, no problem.
- 28. Use custom sections when customize forms entity form.



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26. Templatize your forms!

- 27. Custom one-time question, no problem.
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- 29. Enhanced relationship with contact/lead entities



Forms

26. Templatize your forms!

- 27. Custom one-time question, no problem.
- 28. Use custom sections when customize forms entity form.
- 29. Enhanced relationship with contact/lead entities
- 30. Ensure form fields will always have a value




31. Avoid consumer fatigue with quiet time + frequency capping.





- 31. Avoid consumer fatigue with quiet time + frequency capping.
- 32. Dig into journey goals + exit criteria.

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Real-time journeys 🗘					

Journeys

- 31. Avoid consumer fatigue with quiet time + frequency capping.
- 32. Dig into journey goals + exit criteria.
- 33. Leverage conditions beyond emails.





- 31. Avoid consumer fatigue with quiet time + frequency capping.
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34. Use journeys for marketing *and* sales engagement.

Journeys

- 31. Avoid consumer fatigue with quiet time + frequency capping.
- 32. Dig into journey goals + exit criteria.
- 33. Leverage conditions beyond emails.
- 34. Use journeys for marketing *and* sales engagement.

35. Create journeys with agents.



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36. Save time with templates.







36. Save time with templates.

37. Custom Columns do not copy.





Journeys

- 36. Save time with templates.
- 37.Custom Columns do not copy.
- 38. Learn more with tile analytics.

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Journeys

- 36. Save time with templates.
- 37.Custom Columns do not copy.
- 38. Learn more with tile analytics.
- 39. Segment ongoing journey reentry



والتلفينية والفرالية ففقاله

و المناجبات



- 36. Save time with templates.
- 37.Custom Columns do not copy.
- 38. Learn more with tile analytics.
- 39. Segment ongoing journey reentry.
- 40. Don't do it, email deduplication.



41. Know your hierarchy.

Contoso Perfection is brewing.	
Update your email preferences	
Choose how you'd prefer to hear from us	Compliance Profile Where each purpose an
My email address is:	corresponding topic(s) res
someone@example.com \lor	tied to each email
I'd like to receive information about:	↓
Special Offers	Purposes
Newsletters	Identifies the different way organization uses a customer
Upcoming Events	(e.g., commercial, transacti
I'd like to receive notifications about:	tracking)
My Account	
My Events	Topics
Unsubscribe me from all marketing communications.	Live within a purpose, eac which can be opted in or o
 I agree to share my interaction data to improve the quality and relevance of this service. 	(e.g., promos, events, nev
Submit	

each purpose and onding topic(s) reside; ed to each email Purposes the different ways an n uses a customer's data nmercial, transactional, tracking) Topics nin a purpose, each of an be opted in or out romos, events, news)

41. Know your hierarchy.42. Sharing (purposes) is caring.



- 41. Know your hierarchy.
- 42. Sharing (purposes) is caring.
- 43. Looking to use form prefill? Make sure your tracking is set up.

	t∰ Prefill 3/4 fields	Section > Column > Short text Edit field	E. ÷
What is your first name? *		Map user input to ①	\$
Enter vour first name Short text ~ 🗊		lest Name Contact > lastname	là
What is your last name? *	9	Placeholder text	
Enter your last name	_	Enter your last name	
Frances 2 and a second		Default value	
What is your email? *	G9	Required	
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Job Title		✓ Properties	_
Job Title		Prefill ①	
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Submit		Hide field	

- 41. Know your hierarchy.
- 42. Sharing (purposes) is caring.
- 43. Looking to use form prefill? Make sure your tracking is set up.
- 44. Dare to Double Opt-in



- 41. Know your hierarchy.
- 42. Sharing (purposes) is caring.
- 43. Looking to use form prefill? Make sure your tracking is set up.
- 44. Dare to Double Opt-in
- 45. Make consent visible to all.

III Dynamics 365	Customer Insights - Journeys	rch	SANDBOX 🛛	+ 🛛 🍥 ? 👁 🅃		
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 Forms More channels 	Newsletter	⊖ Will not send	Not set (Edit)			
Assets	> Transactional Doubled	Will send Reason: Consent not needed	Opted in (Edit)			
RJ Real-time journeys 🗘						



46. Test. Then test again.



46. Test. Then test again.

47. Should you use CI-J RT only consent?

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46. Test. Then test again.

- 47. Should you use CI-J RT only consent?
- 48. To opt-in or out, those are the only options.



46. Test. Then test again.

- 47. Should you use CI-J RT only consent?
- 48. To opt-in or out, those are the only options.
- 49. Preference centers are for preferences only.



- 46. Test. Then test again.
- 47. Should you use CI-J RT only consent?
- 48. To opt-in or out, those are the only options.
- 49. Preference centers are for preferences only.
- 50. Are your consent checks running?



والأفيالية المقاربة والتشاشي الأفيالية المفقيلية ال

Coming Soon...





Coming Soon...

- Pause and resume journeys Preview in June
- Heatmap email analytics GA in June
- Unmapped fields for marketing forms GA in June
- Unmapped field for events forms GA in July
- Respect quiet times based on location and time zone GA in July

• Journey tile analytics – GA in May

Coffee + Dunn Sessions

- Copilot Wizardry in Dynamics 365 Customer Insights
 - Tomorrow 10:15 11:15am, Roosevelt 3AB-East Tower

Coffee + Dunn Resources



Blog



Knowledge Hub

Thank you for attending!

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