



COMMUNITY SUMMIT

Dynamics 365 CE

October 11–15, 2026
Gaylord Opryland Resort



The largest independent Microsoft AI & Business Applications User Conference on the planet.



| Real-World Dynamics 365 Customer Insights Implementation Pitfalls



@ 2026 Dynamic Communities

| Speakers



Susana Ramos
VP, Commercial Operations



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Solution Architect



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Commercial Operations Lead



About Coffee + Dunn

We help modern marketers become **revenue operators**.

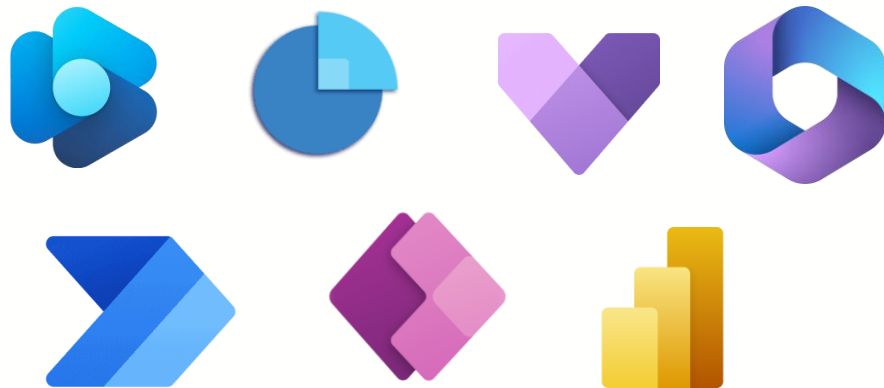
Methodology

PLAN > BUILD > RUN

Services

-  Customer Engagement + Marketing
-  Revenue Operations
-  Data, CDP + AI
-  Training + Enablement

Specializations



By the Numbers

100%

Microsoft-Certified
Consultants + Architects

2x

Microsoft Partner of
the Year / Finalist

≈ 500

Successful client
engagements
over 13+ years

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| You'll Learn How To...



1

Spot
the Surprises

2

Apply
the Fixes

3

Understand
the impact
of Training

| Pitfall #1

Good tech,
bad **process** plan

The fix:

ownership +
business **outcomes**



| Pitfall #1



Turn the wish list into outcomes

What we asked for	What we actually need	Owner + metric
"We want journeys"	Nurture paths that lead to conversion	Marketing · influenced conversion rate
"We want lead scoring"	Route sales-ready leads to reps in a timely manner	Sales Ops · time-to-first-touch
"We want a 360 view"	Give account managers renewal-risk signals	CS lead · renewals flagged 90 days out

| Pitfall #2

Not getting your
ALM house in order

The fix:

Align on **solution
promotion, publishers,
etc.**



| Pitfall #2



ALM decisions to make **before you build**

- 1

Set your publisher and prefix

One custom publisher and a meaningful prefix, decided before you build to avoid unwinding later.
- 2

Define the path

Dev → Test/QA/Staging → Prod.
Say it with us: **nothing gets built directly in production.**
- 3

Know what moves

Which CI-J assets travel in solutions?
Which have to be set up per environment?
- 4

Ship managed, automate it

Managed solutions downstream, deployed through Power Platform Pipelines or Azure DevOps. (Just say "no" to manual export and import.)

| Pitfall #3



Configuration **bloat**

The fix:

"How am I going to use this?"



| Pitfall #3



Three questions before anything gets built

Who uses it?

A named person or role, not
"marketing"

What decision does it drive?

If nothing changes because of it,
don't build it

What breaks if we turn it off?

If the answer is "nothing," it's
bloat

Symptoms: custom fields with no data in them · segments named "v2-FINAL-use-this" · scoring models nobody reads · triggers no journey listens to

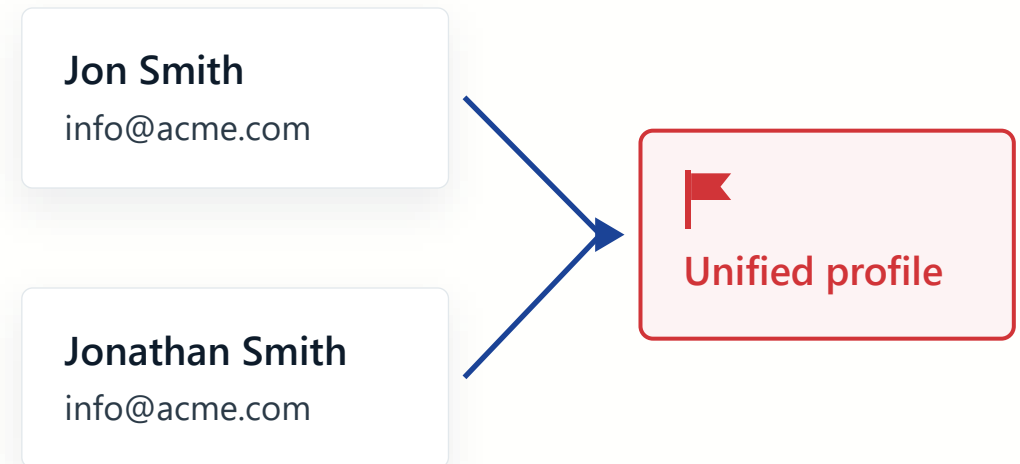
| Pitfall #4



Matching rules are too loose

The fix:

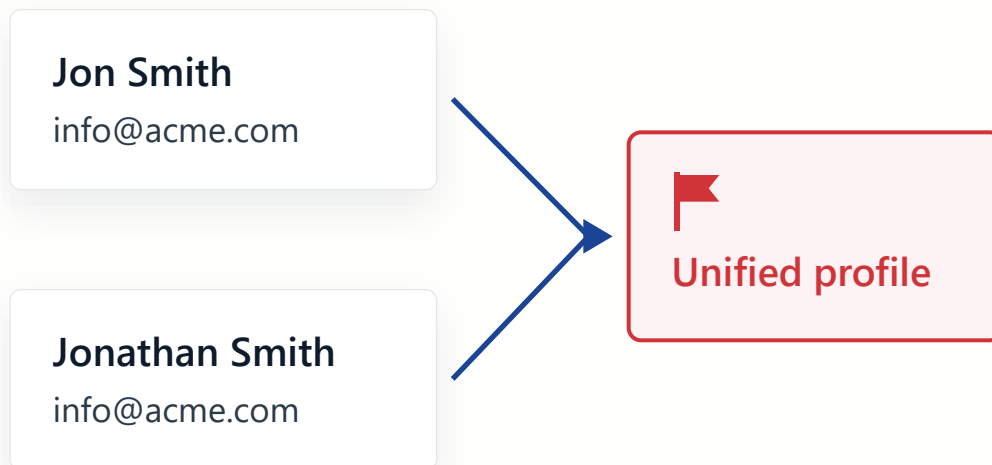
Fix profile sources,
normalize data, **match**
on exact, **review**



| Pitfall #4



What an **overmerge** looks like

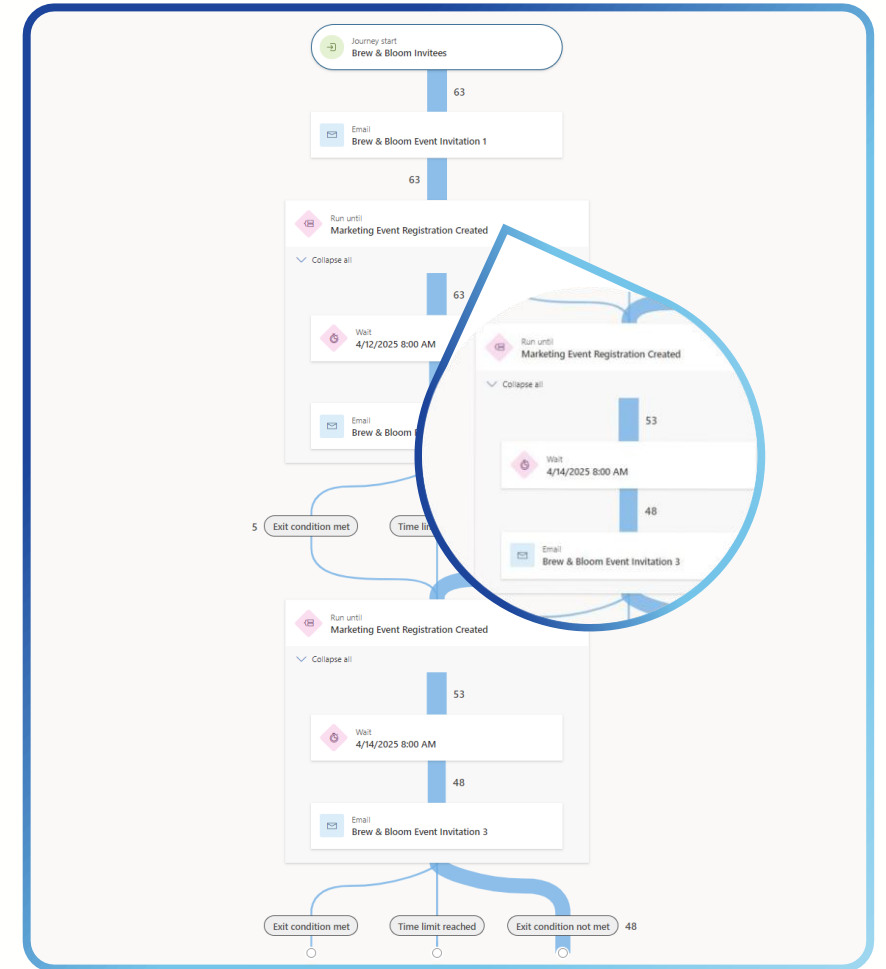


- 1 **Fix the sources.** Dedupe within each source first and pick a reliable primary key.
- 2 **Normalize.** Lowercase and trim emails, standardize phone formats, clean name variants.
- 3 **Match exact first.** Lead with exact email or ID rules, add fuzzy rules later with high thresholds, and exclude junk values (info@, test@, 555-0000).
- 4 **Review every run.** Spot-check the profiles with the most merged source records. A single profile with hundreds of source records is a red flag.

| Pitfall #5

Assuming
audiences = segments

The fix:
Revisit paths for
trigger-based opportunities



| Pitfall #5



Segments answer who. Triggers answer when.

Segment-based

"Everyone who attended the webinar"

Follow-up goes out next Tuesday

No-shows get the same email

Refreshes on a schedule

Trigger-based

"The moment someone attends"

Follow-up goes out within the hour

No-shows get a recording path

Fires on a real event: form submit, sales stage change, email engagement, custom trigger from Power Automate (e.g. app usage)

Ask "Which moment matters?" before you ask "who's on the list?"

| Pitfall #6



Waiting to focus on **consent**

The fix:
Build your consent
roadmap now

\$22.09B

Projected value of the email
marketing market by 2030

20% vs 2%

Average CTR for some industries
can be upwards of 20%, compared
to non-compliant CTR of 2%

2.71x

the cost of compliance

€7.1B

in GDPR fines across more than
2,800 enforcement actions

| Pitfall #6



- 1 Talk to legal**

Get guidance on risk, region and regulation, and plan with the future in mind.
- 2 Design the experience**

For internal users and end consumers alike: ease of use, easy to understand, respecting consent, flexibility.
- 3 Translate it into CI-J**

Compliance profiles, purposes, topics and enforcement models.
Keep it simple; phase it.
- 4 Apply it in delivery**

Connect consent to your emails, build it into segmentation, and let the journey honor it.

| Pitfall #7



Unifying data nobody uses

The fix:

Start from the activation,
work backward to the data



That's you, looking for the journey
that uses any of that data you just
had to have

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Pitfall #7



Work backward from the action

- 1

Name the action

What changes because of this data?
e.g., a journey fires, a seller gets a Teams message, or a service rep gets a new case.
- 2

Define the signal

Identify the measure, segment, or prediction that drives that action, such as "no purchase in 90 days" or a churn risk score.
- 3

Bring in only what feeds it

Map the sources and attributes that signal needs and leave the rest for later phases.
- 4

Wire it up + watch usage

Connect it to CI-J segments and journeys, seller + service views or exports, then confirm people are using it.

Example: Churn risk score → shown on the account in Sales → triggers a CI-J save journey

| Pitfall #8

Underestimating the impact of good **training**

The fix:

Ensure training plans
are based on **real-world,
functional** scenarios



| Pitfall #8



Train each audience **for its own job**

Users

Marketers, sellers, service reps

NEEDS TO

Do their day-to-day work in CI-J without help

TRAIN ON

Their real journeys, segments, and emails, with their own data

Less ramp-up time

Admins

The people who own the platform

NEEDS TO

Keep it healthy and change it safely

TRAIN ON

Unification runs, solution promotion, consent settings, and what to check when something breaks

Less rework + dependency

Execs + sponsors

The people who fund and back it

NEEDS TO

Know what "working" looks like and keep backing the change

TRAIN ON

The outcomes, owners, and metrics they'll review, and the decisions only they can make

Sharper use cases

The test: Can each audience do its own job without waiting on another?

| Eight Pitfalls We See Most



1 Good Tech, Bad Plan
Strategy

3 Configuration Bloat
Platform

5 Assuming Audiences = Segments
Activation

7 Unifying Data Nobody Uses
Data

2 ALM House Not in Order
Platform

4 Matching Rules Too Loose
Data

6 Waiting to Focus on Consent
Compliance

8 Underestimating Good Training
Adoption

Your Implementation Checklist



☐ **Plan:** one or two outcomes, each with an owner and a metric

☐ **Configuration:** everything built has a user and drives a decision

☐ **Journeys:** "which moment matters?" asked before "who's on the list?"

☐ **Activation:** every data source feeds a named action people actually use

☐ **ALM:** custom publisher and prefix, Dev → Test → Prod, managed solutions

☐ **Unification:** sources cleaned, exact match first, merges reviewed every run

☐ **Consent:** legal guidance in hand, modeled in CI-J, honored in every journey

☐ **Training:** users, admins, and sponsors trained on real scenarios before go-live

Get the full checklist:



| Resources



Your Implementation
Checklist



Blog



Knowledge Hub

| Q+A



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**Thank you for
Attending!**



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