

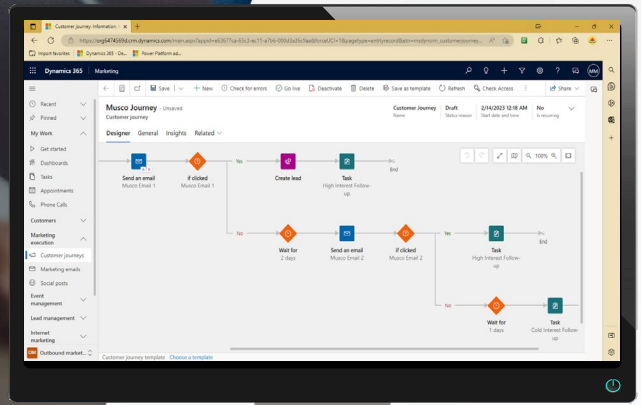


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Powerful Marketing Automation Campaigns to Consider

MARCH 23, 2023



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WEBINAR

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WEBINAR

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WEBINAR

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Agenda

WEBINAR

- What Is Marketing Automation?

- Automation 1: Lead Scoring

- Automation 2: Nurturing

- Automation 3: Gated Content

- Automation 4: Event Management

- Automation 5: Subscription Management

- Automation 6: Re-Engage Previous Customers

Marketing Automation

- Market Size 2022

\$5.2 billion

- Market Size 2027

\$9.5 billion



What Is Marketing Automation?

“Marketing automation is the technology that allows companies to centrally orchestrate and manage their interactions with customers.”

Automation #1: Lead Scoring

- What is it?
 - Lead scoring is the process of assigning values to each lead you generate for the business
- What makes it effective?
 - Lead scoring allows you to score your leads based on a variety of attributes
 - Once it's set up, the system assigns the points without your involvement
- How to incorporate lead scoring
 - Set up scoring models based on your company's data from past leads

Lead Scoring Examples

The screenshot displays the Dynamics 365 Marketing interface for a lead scoring model named "3-Month Engagement". The model is currently in a "Draft" status. The main workspace shows a visual flowchart with four conditions, each linked to an action:

- Condition:** Email Clicks (Weight: 1) → **Action:** 5 point increase
- Condition:** Event Registrations (Weight: 1) → **Action:** 25 point increase
- Condition:** Website Visits (Weight: 1) → **Action:** 5 point increase
- Condition:** Form Submissions (Weight: 1) → **Action:** 50 point increase

The right-hand pane shows the "Properties" tab for the selected action, where the "Score update" is set to +5.

Lead Scoring Examples

The screenshot displays the Dynamics 365 Marketing interface for a "Lead Score Journey". The top navigation bar includes "Dynamics 365" and "Marketing". The main header shows the journey name "Lead Score Journey - Saved", its status "Draft", and other details like "3/7/2023 5:39 PM" and "No" for "Is recurring".

The central area shows a workflow diagram with the following steps:

- Starts when:** Contact is a member of the segment 3-Month Engagement Lead Score 50+.
- Start** (circle icon)
- Wait for 1 hours** (diamond icon)
- Send an email Lead Score Email 1** (envelope icon)
- if clicked Lead Score Email 1** (diamond icon with question mark)
- Yes path:**
 - Create lead** (person icon)
 - Task High Interest Follow-up** (document icon)
 - End** (circle icon)
- No path:**
 - Wait for 2 days** (diamond icon)
 - Send an email Lead Score Email 2** (envelope icon)
 - if cli Lead Scor** (diamond icon)

The right-hand panel, titled "Audience", shows configuration options:

- Source Type***: Segment
- Segment**: Segment
- Segment**: Segment
- Inclusion**: Inclusion
- 3-Month Engagement Le...**
- + Add condition**
- Name***: 3-Month Engagement Lead Score 5...
- Status Reason***: Live
- Modified by**: [User Name]

Automation #1: Lead Scoring

- Scoring leads based on a variety of attributes
- System assigns the points based on their engagement
- Set up scoring models based on your company's data from past leads
- Nurture those leads that are currently engaging with your content

Automation #2: Nurturing Current Customers

- How do we nurture current customers?
 - Segmentation
 - Product-specific campaigns
 - New customer onboarding
- What makes it effective?
 - Personalized content
 - Already customers
 - Once this automation is set up, it runs on its own

Segmentation

The screenshot displays the Microsoft Dynamics 365 Marketing interface. The top navigation bar shows 'Dynamics 365 | Marketing' and various utility icons. The left sidebar contains navigation options: Dashboards, Tasks, Appointments, Phone Calls, Customers (Accounts, Contacts, Segments), Subscription lists, Marketing execution (Customer journeys, Marketing emails, Social posts), Event management, and Lead management. The main content area is titled 'Segment by Geo & Industry - Saved' and includes a toolbar with actions like Save, New, Check for errors, Go live, Deactivate, Delete, Refresh, Check Access, Assign, and Share. The segment details show it is a 'Dynamic segment' that is 'Stopped' with '0 Members'. The 'Definition' tab is active, showing a search prompt 'Who would you like in this segment?' and a hierarchical filter structure: 'Contact' (with a checkbox for 'Do not allow Bulk Emails' set to 'Allow'), 'AND' (Account (Contact -> Account (Company Name))), 'AND' (Address 1: State/Province is WI), and 'AND' (Industry is Consulting). There are 'Add' buttons at the bottom of the filter structure and a 'Natural view' toggle.

Segmentation

The screenshot shows the Dynamics 365 Marketing interface for defining a segment. The title bar reads "Segment by Geo & Industry - Saved". The segment is currently "Stopped" and has 0 members. The "Definition" tab is active, showing a visual builder with the following conditions:

- Contact
- Do not allow Bulk Emails Is Allow
- AND Account (Contact -> Account (Company Name))
- Address 1: State/Province Is WI
- AND Industry Is Consulting

Buttons for "Add" and "Undo/Redo" are visible at the bottom of the definition area.

The screenshot shows the Dynamics 365 Marketing interface for designing a lead score journey. The title bar reads "Lead Score Journey - Saved". The journey is currently a "Draft" and was last modified on 3/7/2023 at 5:39 PM. The "Designer" tab is active, showing a flowchart with the following steps:

- Start
- Wait for 1 hours
- Send an email Lead Score Email 1
- If clicked Lead Score Email 1 (Decision point)
- Yes path: Create lead -> Task High Interest Follow-up
- No path: Wait for 2 days -> Send an email Lead Score Email 2 -> If clicked Lead Score Email 2 (Decision point)

The "Audience" panel on the right shows the source type as "Segment" and includes a condition: "3-Month Engagement Lead Score 50+".

Segmentation Options

- Limited only by your solution
- Demographics – age, location, job title, industry, etc.
- Product interest
- Engagement (lead scoring, web visits, downloads, etc.)
- Open Quotes
- Opportunities/Opportunities lost
- New Orders
- Much more

Product Interest

The screenshot displays the Microsoft Dynamics 365 Campaign Automation Builder interface. The top navigation bar includes the Dynamics 365 logo, the name of the automation 'ClickDimensions', and various utility icons. Below this is a toolbar with actions like Save, Save & Close, New, Delete, Refresh, Check Access, Open Builder, Clone, Assign, Flow, and Share. The main header shows the campaign name 'Product Interest - Web Visits - Saved' and the current view 'Builder'. The left sidebar contains navigation options for Home, Recent, Pinned, Email, Automations, and Messaging. The central workspace features a grid with a workflow diagram: a red trigger icon 'Product 1 Pages' is connected by a green arrow to a blue action icon 'Add to Product 1 Interest List (L)', which is further connected to another blue action icon 'Add to Product 1 Interest List (C)'. A 'GOAL' icon is visible in the top right of the grid. On the right side, there is a panel titled 'Automation Elements' with sections for 'TRIGGERS' (Submitted Form, Submitted Subscription, Submitted Survey, Email Interaction, Added to List, Page Visited, Social Clicks, Manual Add) and 'ACTIONS'.

Product Interest

The screenshot displays the Dynamics 365 Campaign Automation Builder interface. The top navigation bar includes 'Dynamics 365' and 'ClickDimensions'. The main header shows 'Product 1 Campaign Automation - Saved' and 'Campaign Automation'. The left sidebar contains navigation options: Home, Recent, Pinned, Email (New Email, Drafts, Scheduled, Sent, Templates, Email Events), Automations (Campaign Autom..., Intelligent Dashb..., Calendar, Marketing Calendar, Email Statistics), and Messaging.

The central workspace shows a workflow diagram on a grid. The workflow starts with two 'Product 1 Interest List' triggers (one labeled '(C)' and one '(L)'). Both lead to a '2 Hour Wait' action, followed by a 'Product 1 Interest Email' action. From there, the flow splits into two paths:

- Top Path:** 'Email Interaction 1' (red circle) leads to 'Notify User 2' (blue square), then 'Campaign Response 1' (blue square), 'Create Task Activity 1' (blue square), and finally a '7 Day Wait' (yellow square).
- Bottom Path:** 'Email Interaction 1' (red circle) leads to a '7 Day Wait' (yellow square).

Both paths converge at a final '7 Day Wait' (yellow square) which is marked as the 'GOAL'.

On the right, the 'Automation Elements' panel is visible, categorized into:

- TRIGGERS:** Submitted Form, Submitted Subscription, Submitted Survey, Email Interaction, Added to List, Page Visited, Social Clicks, Manual Add.
- ACTIONS:** (Three blue square icons are visible at the bottom of the panel).

Product Interest Benefits

- Send tailored product content to engaged leads
- They tell you when they're ready to purchase
- Personalized content can be more effective
- Continue to stay in touch with customers automatically

New Customer Onboarding

The screenshot displays the Microsoft Dynamics 365 Campaign Automation Builder interface. The main window shows a workflow titled "New Customer Onboarding Campaign Automation - Saved". The workflow is visualized on a grid and consists of the following steps:

- Trigger:** New Customer Onboarding List (C)
- Action:** 2 Hour Wait
- Action:** New Customer Onboarding Email 1
- Action:** 2 Day Clickthrough
- Branch:** The workflow branches into two paths:
 - Path 1:** Notify User 1 → Campaign Response 1
 - Path 2:** 5 Day Wait
- Final Action:** New Customer Onboarding Email

The right-hand panel, titled "Automation Elements", provides a library of components:

- TRIGGERS:** Submitted Form, Submitted Subscription, Submitted Survey, Email Interaction, Added to List, Page Visited, Social Clicks, Manual Add.
- ACTIONS:** (The bottom section of the panel is partially visible).

The interface includes a top navigation bar with "Dynamics 365" and "ClickDimensions", a left-hand navigation pane with categories like "Email" and "Automations", and a top toolbar with various action icons such as Save, Delete, Refresh, and Publish.

New Customer Onboarding Potential Benefits

- Improve customer sentiment
- Simplify their journey
- Provide them with helpful information
- Setting up the next purchase (upselling)
- Increase customer lifetime value
- More revenue comes from existing customers
- May be able to get testimonials, reviews, & referrals

Automation #2: Nurturing Current Customers

- Creates segmented lists
- Personalized messages
- Provides an evergreen approach to sending content
- Helps move leads through the funnel automatically
- Sets up new customers to be return customers

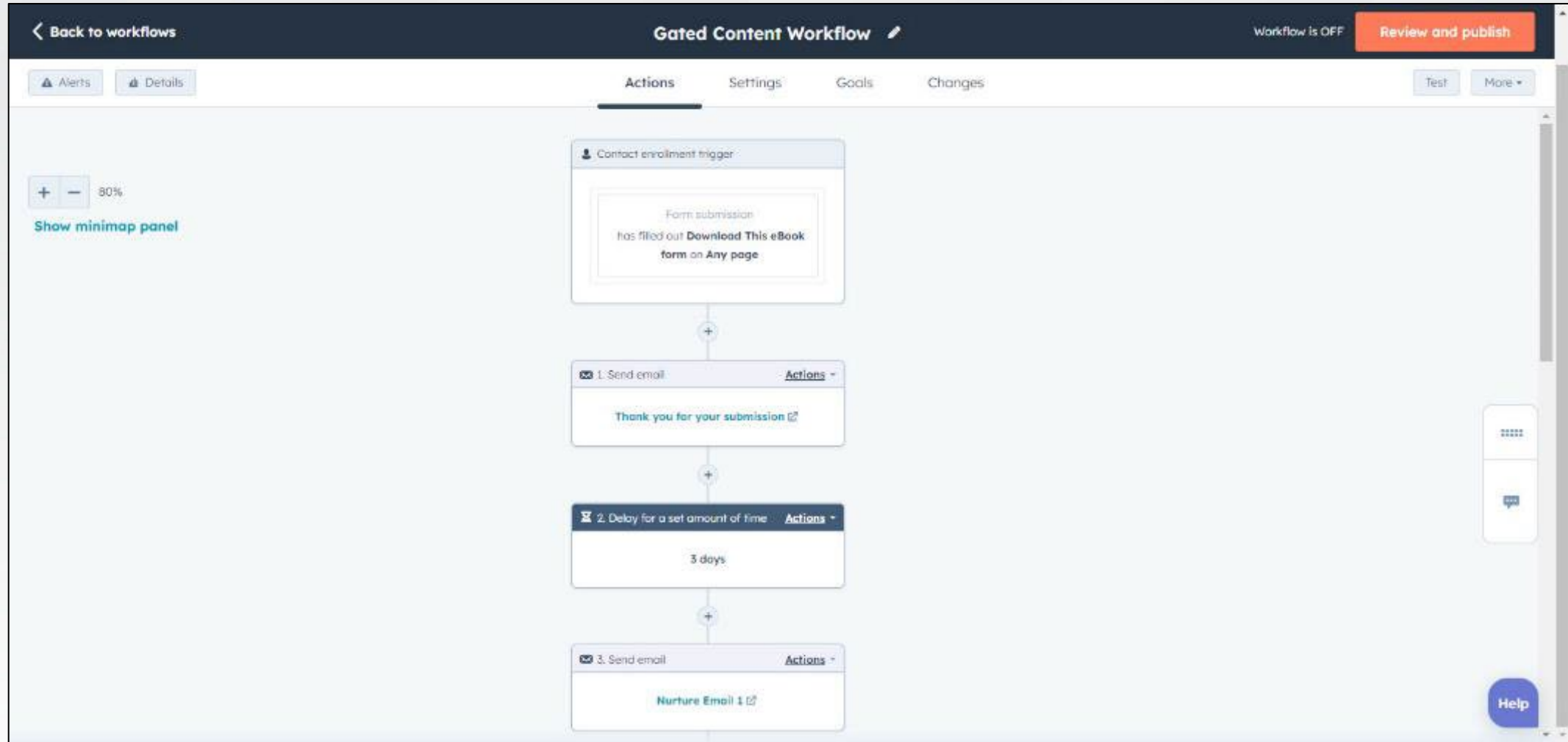
Automation #3: Gated Content

- What is gated content?
 - Online materials, such as whitepapers, eBooks, videos, recorded webinars, anything that requires the visitor to fill out a form before accessing the content
- How can I use gated content?
 - Use your content to gather leads
 - Start them on an automated journey
- What makes it effective?
 - Captures lead information & interests
 - Automation provides them with nurturing
 - Can help marketers know what content works & what doesn't

Gated Content

The screenshot shows a form builder interface for a form titled "Download This eBook form". The interface includes a navigation bar with "Back to all forms", "Learn more", and "Update" buttons. Below the navigation bar are tabs for "Form", "Options", "Style & preview", "Automation", "Embed", and "Actions". The "Form" tab is active, showing a list of "Existing properties" and "Frequently used properties" on the left, and a form preview on the right. The "Frequently used properties" list includes: First name, Last name, Email, Phone number, Street address, City, State/Region, and Country/Region. The form preview shows four input fields: "Email * email" (Contact Property), "First name" (Contact Property), "Last name" (Contact Property), and "Phone number" (Contact Property). A "Submit" button is located at the bottom left of the form preview, and a "Help" button is at the bottom right.

Gated Content

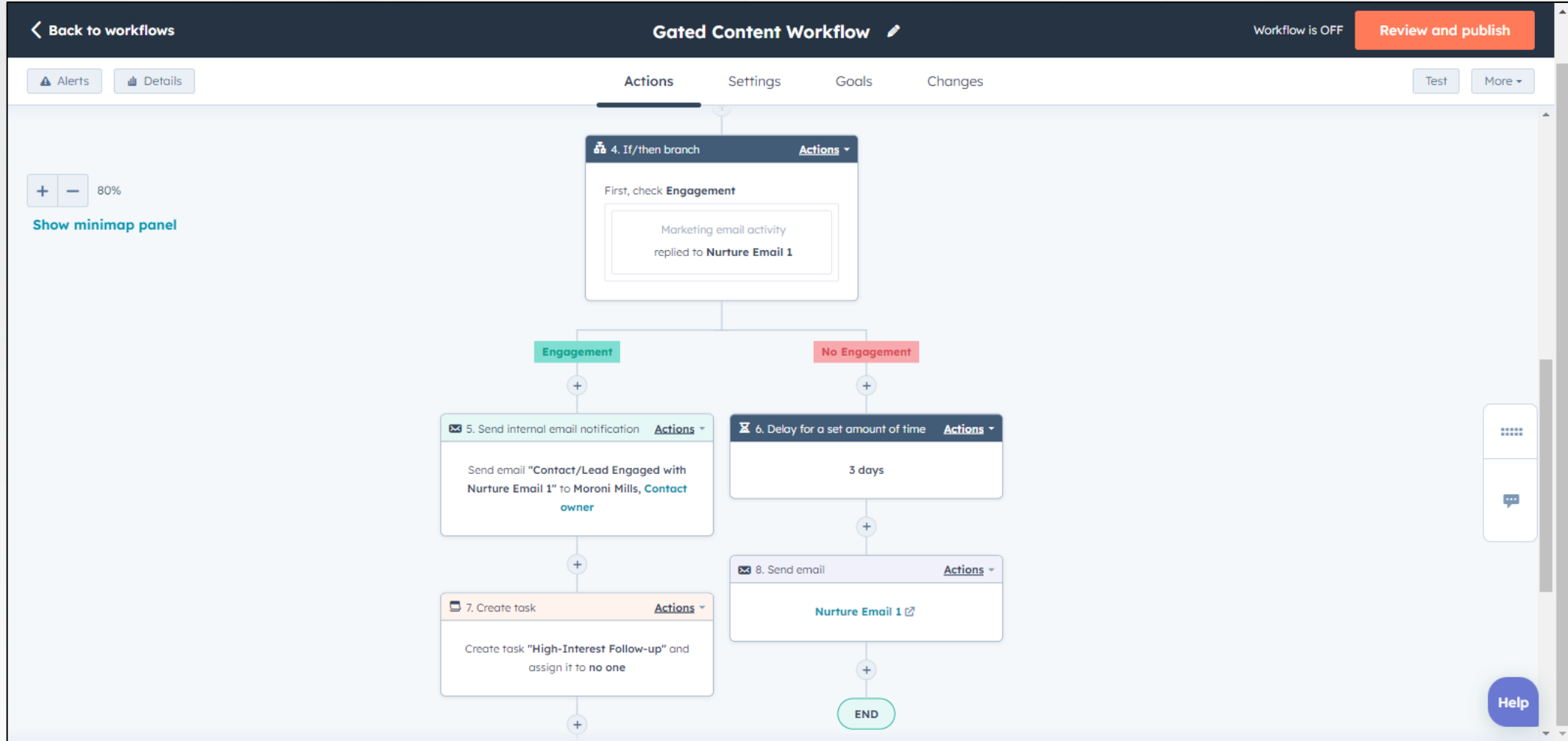


The screenshot displays a 'Gated Content Workflow' configuration page. At the top, there is a navigation bar with a 'Back to workflows' link, the title 'Gated Content Workflow', and a 'Workflow is OFF' indicator with a 'Review and publish' button. Below the navigation bar are tabs for 'Alerts', 'Details', 'Actions', 'Settings', 'Goals', and 'Changes'. The main area shows a vertical flowchart with four steps:

- Step 1:** Contact enrollment trigger. Description: Form submission has filled out Download This eBook form on Any page.
- Step 2:** 1. Send email. Action: Thank you for your submission.
- Step 3:** 2. Delay for a set amount of time. Duration: 3 days.
- Step 4:** 3. Send email. Action: Nurture Email 1.

On the left side, there is a zoom control set to 80% and a 'Show minimap panel' link. On the right side, there are utility buttons for 'Test', 'More', and 'Help'.

Gated Content



Automation #3: Gated Content

- Capture specific information about those most interested
- Place these leads into an automated journey
- Can increase traffic to website
- Segments your audience
- Helps visibility to measure analytics

Automation #4: Event Management

- How can we automate events?
 - Develop a regular cadence for your events
 - Create a drip campaign
 - Follow up with a survey & other content
- What makes it effective?
 - Automate critical event management tasks
 - Capture lead information
 - Nurture leads to become actual customers

Event Management

- Conferences
- Trade Shows & Expositions
- Seminars/Workshops
- Demonstrations/New Product Unveilings
- Facility Tour
- Lunch & Learns
- Parties/Celebrations
- WEBINARS!

Event Management

The screenshot displays the Dynamics 365 Marketing interface for managing a Webinar event. The top navigation bar includes the Dynamics 365 logo, the 'Marketing' section, and various utility icons. A secondary toolbar offers actions like 'Save', 'New event', 'Delete', 'Go live', 'Refresh', 'Check Access', 'Deactivate', 'Process', 'Assign', and 'Share'. The main header shows the event title 'Webinar - Saved', the owner 'Moroni Mills', and the current status 'Draft'. A progress timeline below the header indicates stages: EventMainBusinessProce... (Active for 5 months), Preliminaries (5 Mo), Agenda, Organize, Promote, and Launch. The 'General' tab is selected, showing key information, schedule, and streaming options. A notification for Microsoft Teams is also visible.

Event Details:

- Event name: Webinar
- Event type: Webcast
- Registration count: 0
- Check-in count: 0
- Event URL: ---

Schedule:

- Event time zone: (GMT-06:00) Central Time (U)
- Event start date: 4/4/2023, 11:30 AM
- Event end date: 4/4/2023, 12:30 PM
- Countdown in days: 26
- This is a recurring event: No

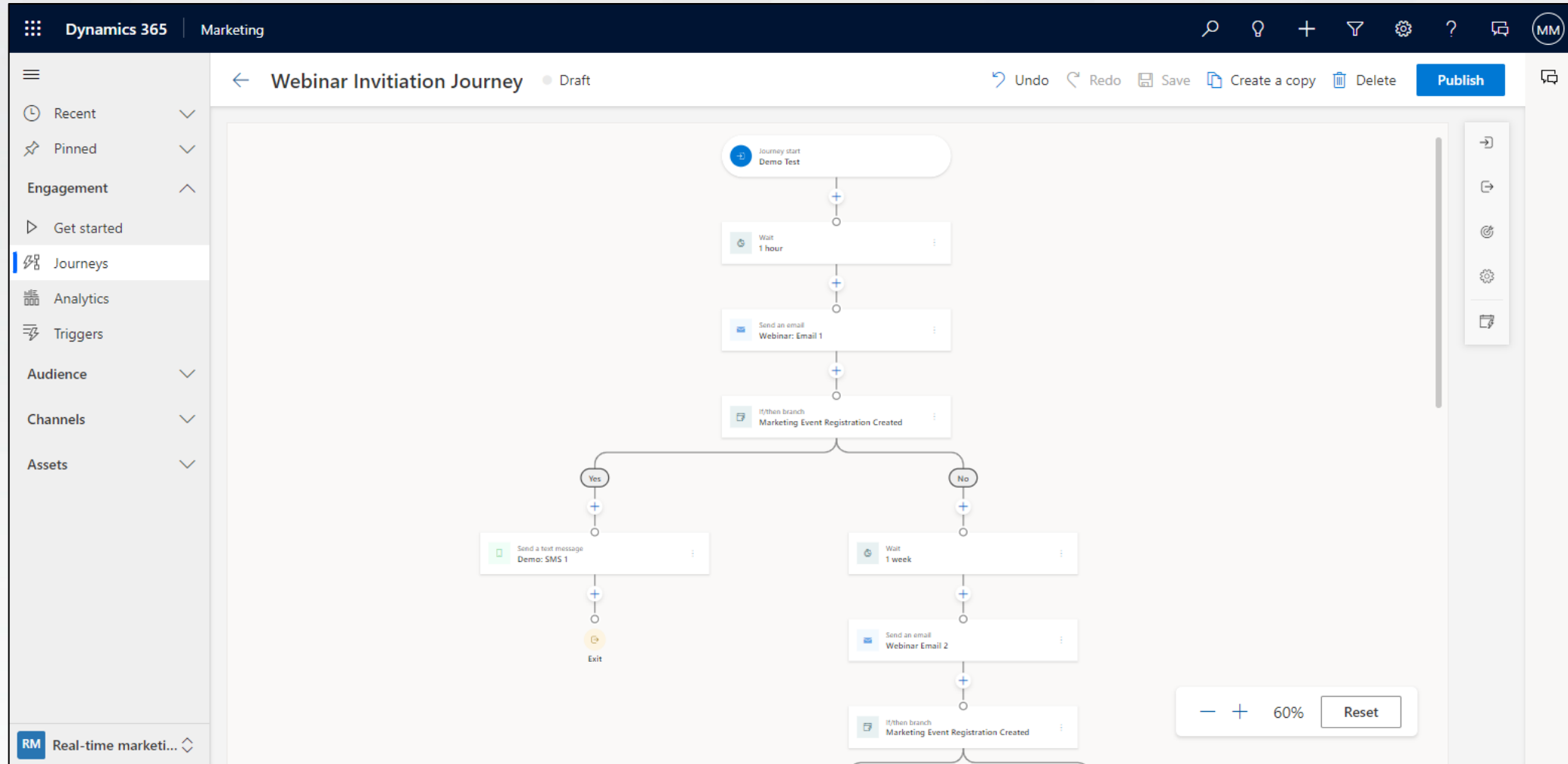
Streaming Options:

- Do you want to stream this event?: No
- Microsoft Teams is available as a streaming channel. Choose Meeting for a two-way group experience or Teams Webinars for webinars with enhanced audience participation controls. Toggle to "Yes" to enable streaming now.

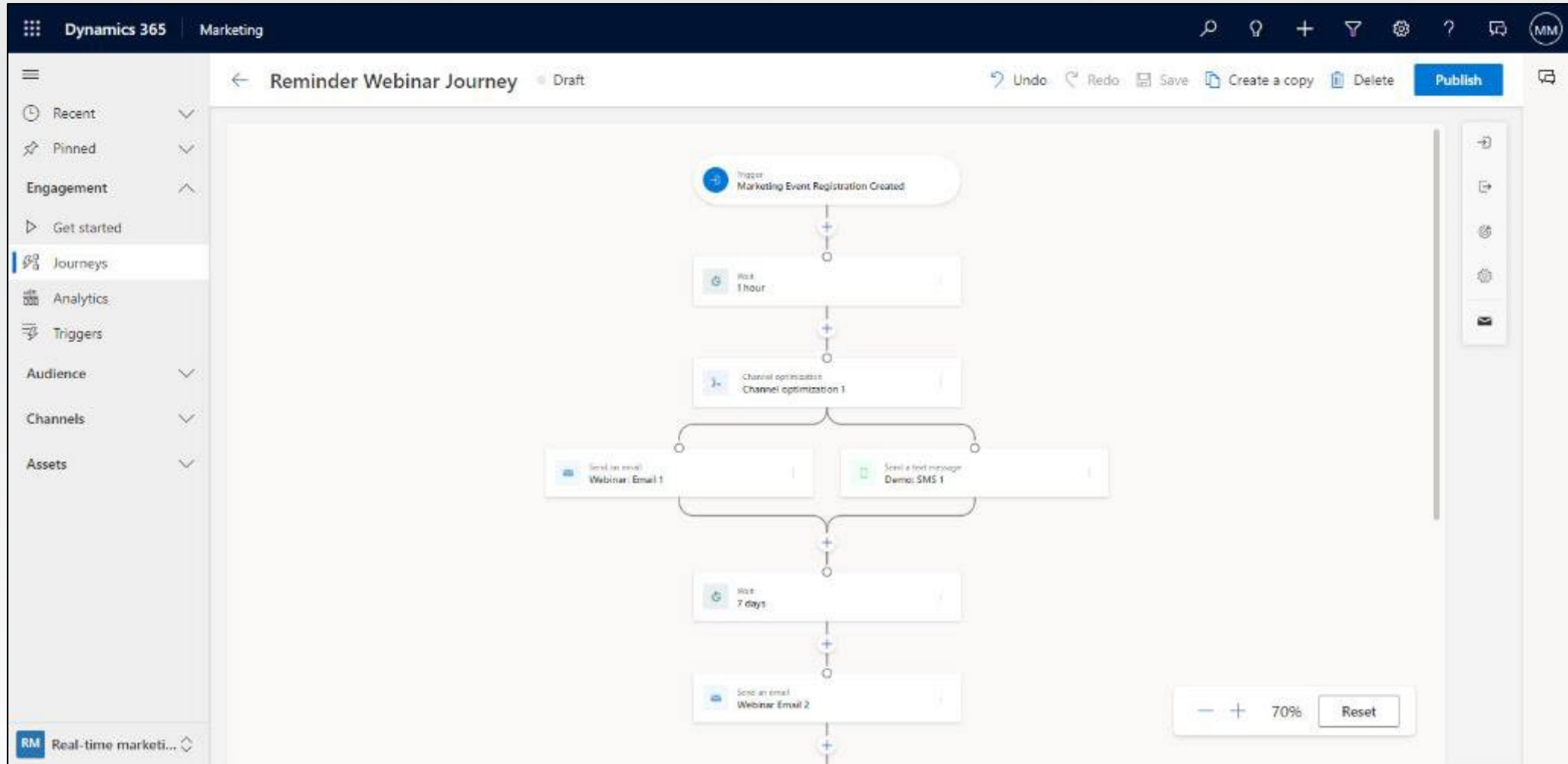
Location:

- Building: ---

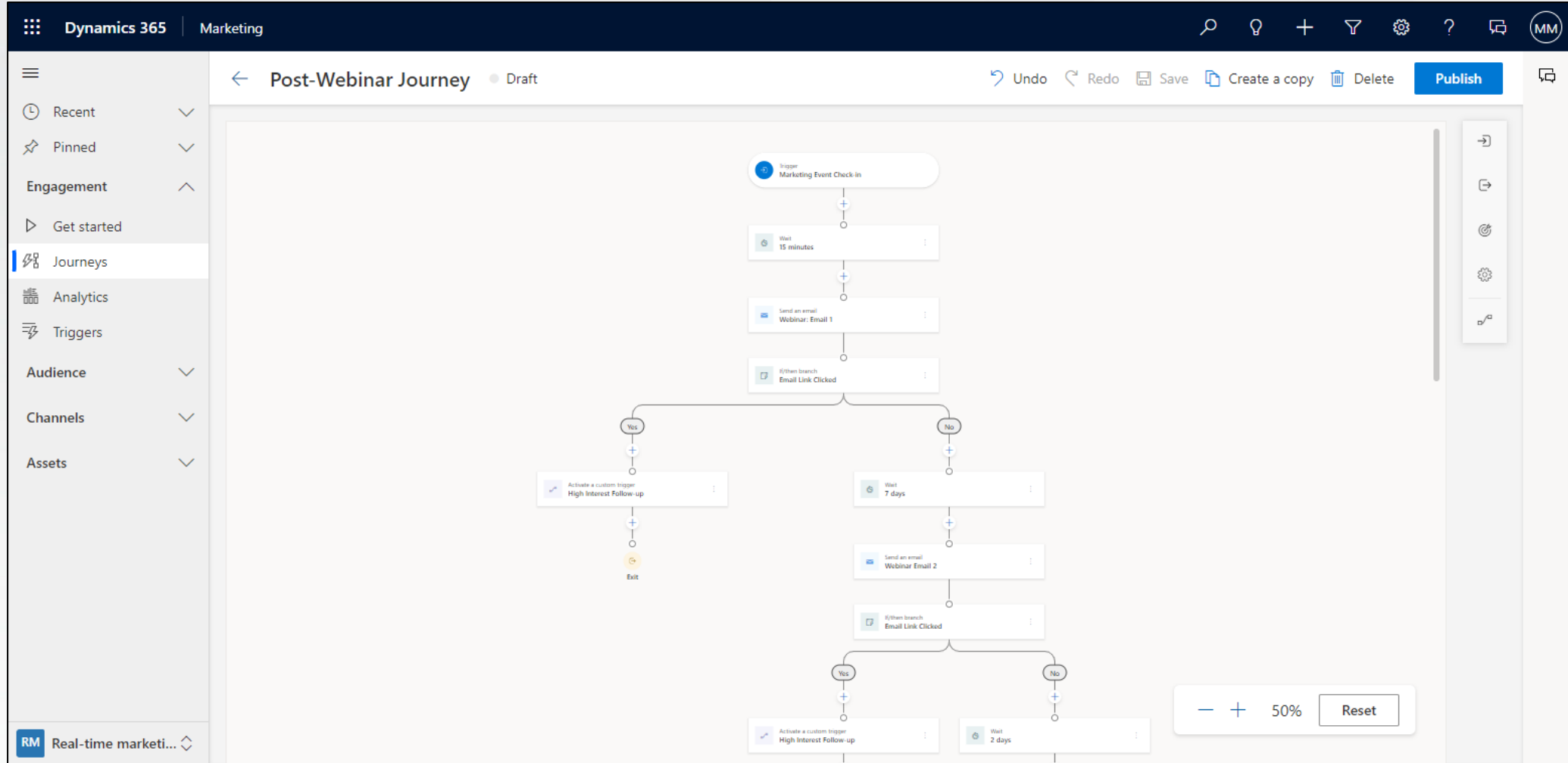
Event Management



Event Management



Event Management



Automation #4: Event Management

Events can ...

- Generate more business
- Increase brand awareness
- Lead to a better understanding of your products & services
- Build relationships
- Help you be seen as a thought leader & build brand trust

Automation #5: Subscription Management

- What is subscription management?
 - The process of allowing customers to choose which emails or SMS messages they would like to receive from you by letting them opt in & opt out of message types
- How can we create automated subscription management?
 - Create a subscription management page/list
 - Create forms on website for visitors to receive e-newsletters or alerts
- What makes it effective?
 - Can increase retention
 - Can reduce unsubscribes
 - Can help keep your lists clean

Subscription Management Tips

- Review what types of subscription lists to have
- Review GDPR & other requirements for your area & industry
- Assess opt-in & opt-out options

Subscription Management

The screenshot displays the Dynamics 365 Campaign Automation Builder interface. The top navigation bar includes the Dynamics 365 logo, the name of the automation 'ClickDimensions', and various utility icons. Below this, a secondary toolbar contains actions like Save, Save & Close, New, Delete, Refresh, Check Access, Open Builder, Clone, Assign, Flow, and Share. The main header area shows the title 'Subscription Management Automation - Saved' and tabs for General, Builder (selected), Participants, and Related. The central workspace features a grid with a workflow diagram. The workflow starts with a 'Submitted Subscription' trigger, which branches into three parallel actions: 'Add to eNewsletter List', 'Add to Blog List', and 'Add to Product Updates List'. These three paths converge into a single 'Thanks for subscribing' email action, which then leads to a 'Notify Team' action. A 'GOAL' icon is visible in the top right of the workspace. To the right of the workspace is a panel titled 'Automation Elements' containing a grid of 'TRIGGERS' such as Submitted Form, Submitted Subscription, Submitted Survey, Email Interaction, Added to List, Removed From List, Field Updated, Registered for Event, and Attended Event.

Automation #5: Subscription Management

- Continue to nurture contacts/leads
- Get used to a regular cadence of content
- Turn to your business with questions
- Update marketing lists
- Segmentation

Automation #6: Re-Engage Previous Customers

- What are some ways to re-engage previous customers?
 - Develop nurture automations for old contacts
 - Send emails to abandoned carts
 - Look at contacts with Lost Opportunities
- What makes it effective?
 - Re-ignite an old flame
 - Keep your brand top of mind
 - Leaves a window open even if a door was shut

Re-Engage Previous Customers

The screenshot displays the Dynamics 365 Marketing interface for a 'Nurture Campaign Automation'. The main workspace shows a flowchart on a grid background. The flow starts with two source lists: 'Nurture Program (A)' and 'Nurture Program (C)'. Both lead to a 'Wait Timer 1' step. From there, the flow proceeds to 'Nurture Email 1', followed by a '2 Day Clickthrough' step. This step branches into two paths: one leading to 'Notify User 1' and 'Campaign Response 1', and another leading to '7 Day Wait'. The '7 Day Wait' step leads to 'Nurture Email 2', followed by another '2 Day Clickthrough' step. This second clickthrough step branches into two paths: one leading to 'Notify User 2' and 'Campaign Response 2', and another leading to a 'GOAL' icon. On the right side, the 'Automation Elements' panel is visible, listing various triggers such as 'Submitted Form', 'Submitted Subscription', 'Submitted Survey', 'Email Interaction', 'Added to List', 'Removed From List', 'Field Updated', 'Registered for Event', and 'Attended Event'.

Re-Engage Previous Customers

The screenshot displays the Dynamics 365 Marketing interface for a campaign automation. The top navigation bar includes 'Dynamics 365' and 'ClickDimensions'. The main header shows the campaign name 'Opportunities Lost Nurture Campaign Automation - Saved' and the 'Builder' tab. The left sidebar contains navigation options for Home, Recent, Pinned, Email (New Email, Drafts, Scheduled, Sent, Templates, Email Events), Automations (Campaign Autom..., Intelligent Dashb..., Marketing Calendar), and Email Statistics (Messaging).

The central workspace shows a flowchart for the campaign automation. It starts with two source lists: 'Source List: Opportunities Lost Nurture Program (L)' and 'Source List: Opportunities Lost Nurture Program (C)'. The flow includes the following steps: 'Wait Timer 1', 'Nurture Email 1', '2 Day Clickthrough', 'Notify User 1', 'Campaign Response 1', '7 Day Wait', 'Nurture Email 2', '2 Day Clickthrough', 'Notify User 2', and 'Campaign Response'. A 'GOAL' icon is visible in the top right of the workspace.

Below the workspace is a toolbar with options: 'SAVE AS TEMPLATE', 'PUBLISH', 'AUTOMATION TEMPLATES', 'CHECK AUTOMATION', 'COPY LINK', and 'FULL SCREEN'. On the right side, there is a panel titled 'Automation Elements' with a 'TRIGGERS' section. The triggers listed are: Submitted Form, Submitted Subscription, Submitted Survey, Email Interaction, Added to List, Removed From List, Field Updated, Registered for Event, and Attended Event.

Automation #6: Re-Engage Previous Customers

- Provides opportunities for future engagement
- Gets your brand back in front of contacts/leads
- Higher probability of returning to their carts for purchase
- Cleans up marketing lists
- Ease of setup

BONUS Automation #7: Social

- Ways to automate social?
 - Use social integrations
 - Form submissions to create segments
- What makes it effective?
 - Can create a fluid campaign
 - Lead generation from different source
 - Engaging with audience

Social

The screenshot displays the Dynamics 365 Marketing Designer interface for a "Social Journey". The top navigation bar includes "Dynamics 365 | Marketing" and various utility icons. The left sidebar lists navigation options such as "Recent", "Pinned", "My Work", "Customers", "Marketing execution", "Customer journeys", "Marketing emails", "Social posts", "Event management", "Lead management", "Internet marketing", "Marketing content", "Marketing templates", and "LinkedIn Lead Gen".

The main workspace shows the "Social Journey" details: Name: Social Journey, Status: Draft, Start date and time: 3/8/2023 6:33 PM, and Is recurring: No. Below this, the "Designer" tab is active, showing a flowchart with the following steps:

- Starts when:** Contact submitted the form DEMO Form
- Start** (Start icon)
- Wait for 1 hours** (Wait icon)
- Send an email Social Email 1** (Email icon)
- if clicked Social Email 1** (Decision diamond)
- Yes path:**
 - Create lead** (Lead icon)
 - Task High Interest Follow-up** (Task icon)
 - End** (End icon)
- No path:**
 - Wait for 2 days** (Wait icon)
 - Send an email Social Email 2** (Email icon)
 - if clicked Social Email 2** (Decision diamond)
 - Yes path:**
 - Create lead** (Lead icon)
 - Task High Interest Follow-up** (Task icon)
 - No path:**
 - Wait for 1 weeks** (Wait icon)
 - Task Cold Interest Follow-up** (Task icon)

At the bottom, there is a "Customer journey template" section with a "Choose a template" link.

BONUS Automation #7: Social

- Gain insights across different channels
- Narrow the focus of which channels are supplying quality leads
- Extend your reach to the audience
- Focusing on social can help develop a more consistent schedule
- Provide more marketing qualified leads to sales

Q&A



Use the Q&A tool to submit any questions you may have

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