

# ACT-ON + MICROSOFT DYNAMICS 365 = BETTER TOGETHER

## Marketing Automation for Microsoft Dynamics 365 CRM

Operating a marketing automation platform like Act-On is a key part of the equation when it comes to growing sales and building your business as a whole. Your sales team needs a streamlined way to use marketing data to advance the sales conversation and keep track of the entire sales funnel. Purpose-built platforms like Microsoft Dynamics 365 CRM and Act-On allow teams to drive more leads, convert more of those leads to revenue, and optimize spend by understanding what works and what doesn't.

### Act-On and Microsoft Dynamics 365

The Act-On marketing automation platform integrated into Microsoft Dynamics 365 CRM delivers a seamless and collaborative experience for marketing and sales. Get the behavioral data and insights you need for smarter, more productive conversations with buyers. With the Act-On and Microsoft Dynamics 365 integration you can successfully grow your business.

### Use Act-On + Microsoft Dynamics 365 to:

#### **CAPTURE AND TRACK QUALIFIED LEADS**

The Act-On and Microsoft Dynamics 365 integration enables marketers to provide sales-qualified leads in a timely manner. This connection allows for:

- Immediate lead creation from form submissions
- Immediate lead creation from webinar registrations via GoToWebinar, Webex, and Zoom
- Campaign engagement tracking and notifications
- Contact notations based on conversion and engagement activity

***“The big selling point for Act-On was the easy and effective integration with Microsoft Dynamics. HubSpot wasn't able to do that at all.”***

- MARY MARTINEZ - DIRECTOR OF MARKETING, HORIZON DISTRIBUTORS

## NURTURE AND CONVERT MORE LEADS

Get Sales and Marketing on the same page and tailor your lead nurturing campaigns.

- Add leads to your CRM campaigns from individual [Act-On Automated Journey Builder](#) steps across multi-channel and multi-touch outreach programs
- Update contact information with each new form submission or activity
- Personalize email recipient data using CRM-specific fields
- Personalize email sender information using an automatic “Sales Owner” signature
- Deliver purchase-ready and informed buyers to your sales team

## OPTIMIZE YOUR FUNNEL

Understand where all of your contacts are in their buyer journeys and test and tune your marketing programs based on their actual needs.

- Import specific customer groups
- Ensure up-to-date data and records
- Segment by basic or advanced profiles and behaviors
- Robust reporting for sales and marketing teams including account, marketing funnel, revenue attribution, and revenue impact reports
- Upgrade to extend the combined value with the optional [Act-On Account-Based Marketing](#)

## CAPTURE MORE INSIGHTS AND TAKE ACTION

Gain a crystal clear understanding of contact outreach and behaviors while reaching out directly through the platform.

- Hot Prospect dashboard details your most valuable and promising leads
- Rapid contact reporting for near real-time outreach
- Email individual and bulk prospects directly through Microsoft Dynamics 365 using: Act-On templates, Act-On signatures, activity tracking, and lead scoring influence
- Understand and execute against digital behaviors by tracking users via [Act-On Website Prospector](#)

## Learn More

*[Click here to learn more about Act-On’s native CRM integration with Microsoft Dynamics or reach out to one of our marketing automation experts by visiting \[act-on.com/demo\]\(http://act-on.com/demo\).](#)*

## ABOUT ACT-ON SOFTWARE

Act-On Software is the world’s growth marketing leader, offering solutions that empower marketers to move beyond the lead and engage targets at every step of the customer lifecycle. Act-On makes customer data actionable so marketers can strategize smart, effective solutions to grow their businesses and generate higher customer lifetime value – all with the fastest time-to-value.

