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Copenhagen – 23rd September 2023

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PLATINUM SPONSOR



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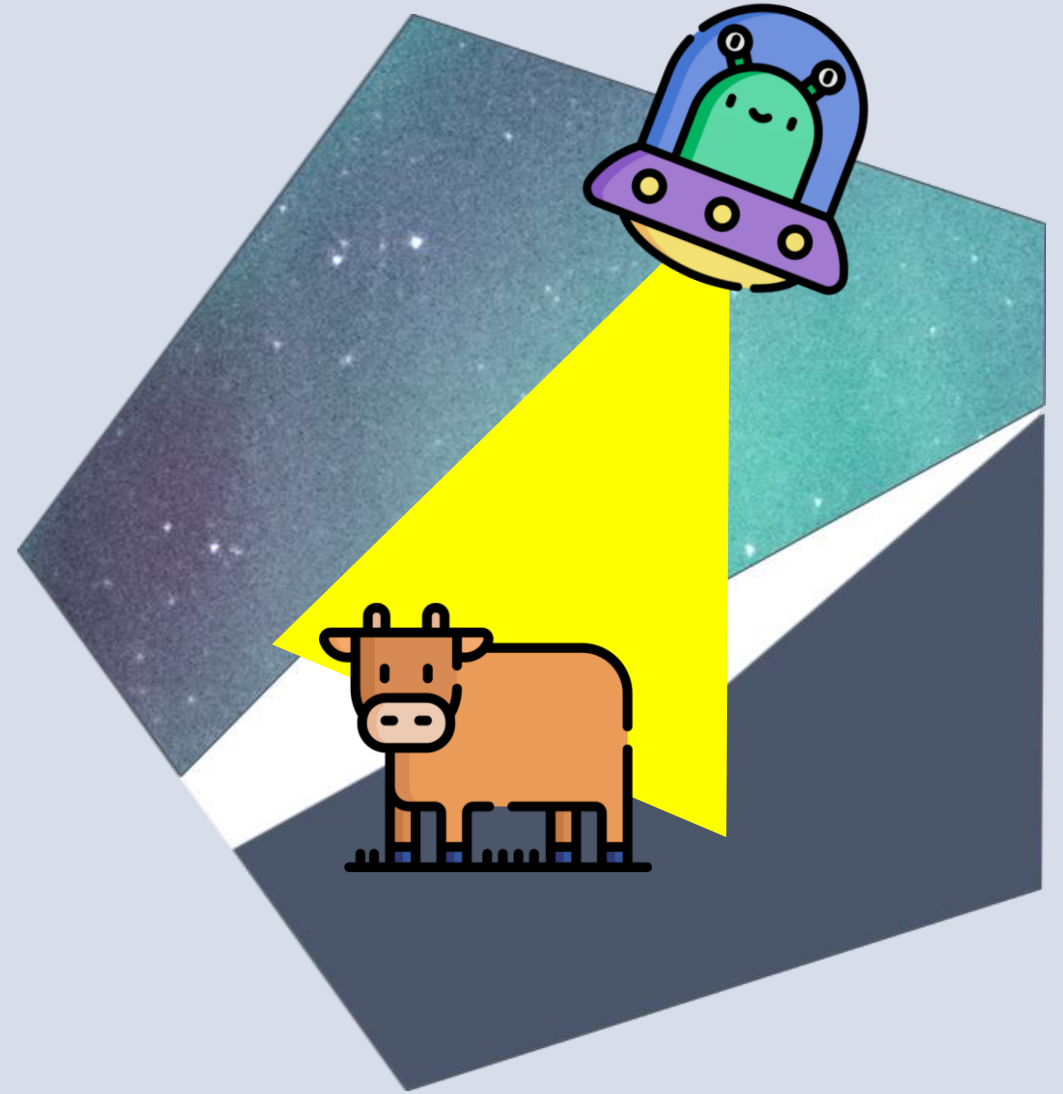
# BRONZE SPONSORS





Maria Dzivakova, Marianna  
Kozanyiova, Fördös András

GDPR compliant Email  
Marketing in Dynamics 365  
Marketing - Real-life global  
use case



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## GDPR fines for non-compliant email marketing

- 
- In 2020, TIM was **fined with €27.8m**
  - In 2022, Wind was **fined with €17m**
  - In 2021, Austrian Post was **fined with €9m**

Sources: [5 biggest email marketing fines from non-compliance](#) | [The EmailOctopus Blog](#)

# András Fördös

Dynamics 365 and PowerPlatform

Confident user of the answer

*"It depends on..."*



[andras.fordos@avanade.com](mailto:andras.fordos@avanade.com)



<https://www.linkedin.com/in/andrasfordos/>



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<https://medium.com/@fordosa90>



# Maria Dzivakova

Dynamics 365 Consultant, Accenture

Specializing in end-to-end Customer Insights & D365 Marketing automation journeys



maria.dzivakova@accenture.com



<https://www.linkedin.com/in/mária-d-a5b40365>



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# Marianna Kozanyiova

Dynamics 365 Consultant, Accenture

Aiming to enable GDPR-friendly D365 marketing campaigns for client organizations



[marianna.kozanyiova@accenture.com](mailto:marianna.kozanyiova@accenture.com)



<https://www.linkedin.com/in/marianna-kozanyiova-602a65104/>



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# Agenda

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- GDPR & Email marketing
  - Use case
  - D365 Marketing features
  - Solution & Demos
  - Transition to Customer Insights - Journeys
  - Lessons learned
  - GDPR Compliance framework
  - Q & A



# GDPR & Email marketing

- Enforcing lawful personal data collection and processing by organizations based on 7 principles

Lawfulness

Purpose limitations

Email marketing consent must be “**freely given**, specific, informed and unambiguous.”

Accuracy

Data subjects can **withdraw previously given email marketing consent** whenever they want, and you have to honor their decision.

Storage limitations

Accountability

You need to keep **documentary evidence of email marketing consent**.

Confidentiality

Data Minimization

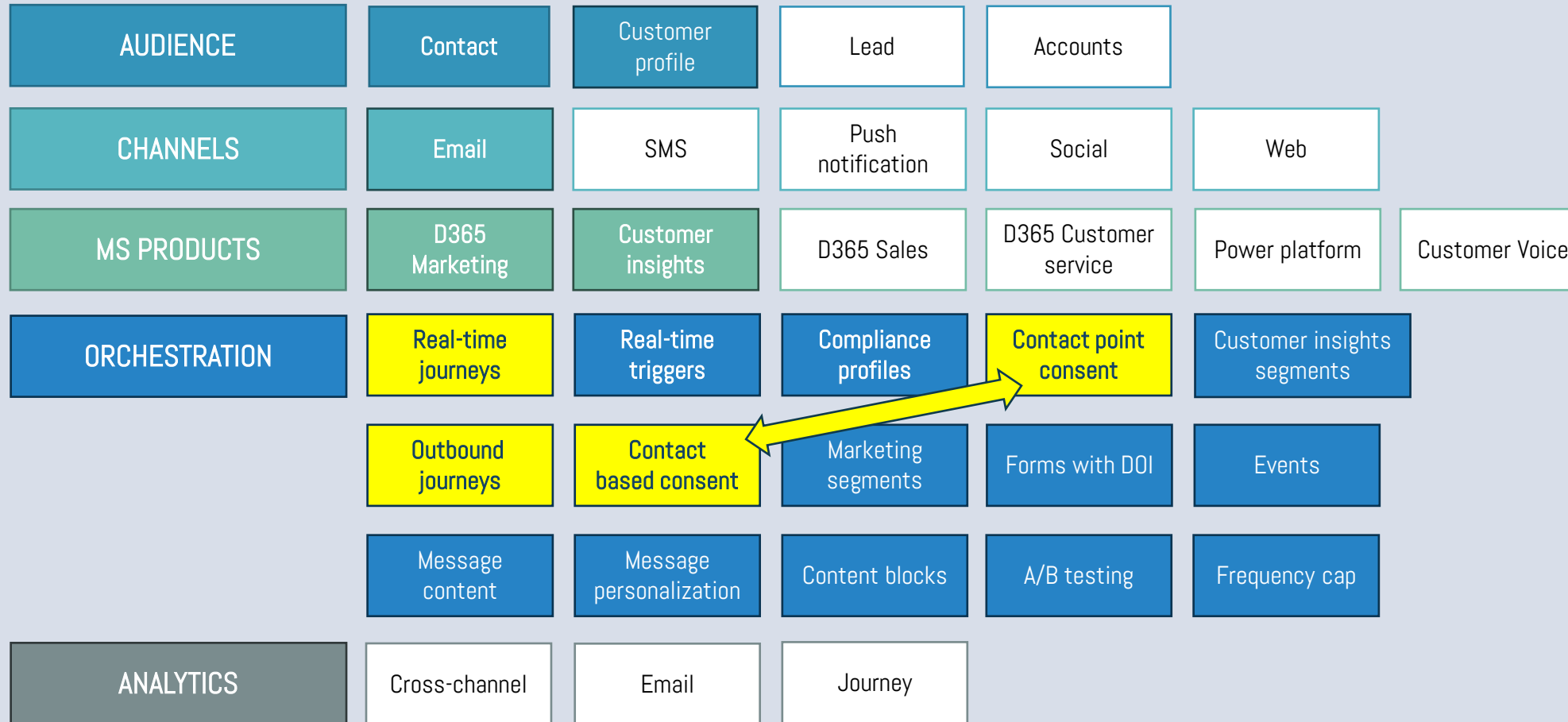
Sources: [What is GDPR, the EU's new data protection law? - GDPR.eu](#); [How does the GDPR affect email? - GDPR.eu](#)



## Use case of Contoso

- Global enterprise
- Existing **Dynamics 365** as CRM
- Customers unique by their **email**
- **Dynamics 365 Marketing** implementation in **2023** = **email marketing consent master**
  - **Consent** collected via touch-points as apps, e-shop, forms
- **GDPR** as the **guiding principle** for email marketing compliance

# Dynamics 365 Marketing automation



# Dynamics 365 Marketing & Contoso compliance features

Custom fields / entity record creation and updates

Out of the Box fields / entities

Contact based consent

Respected by

Outbound & Real-time journeys

**SW Sally Wright** - Saved  
Contact

Summary **Details** Insights Events attended Files Related

**Data protection**

- Marketing email consent: No
- Unsubscribe: Yes
- Consent given: (2) Transactional
- Is a child: No
- Parent or custodian: ---
- Tracking: Allow

**Event information**

First Name: Sally  
Last Name: Wright  
Email: roxel85038@ipnuc.c...  
Originating event: ---

**CONTACT PREFERENCES**

Contact Method: Any  
Email: Allow  
Follow Email: Allow  
Bulk Email: Do Not Allow

*- Single source of truth  
- Required to have simple check-boxes on forms*

*- Used by GDPR consent change record for tracking*

*- Logic designed for Opt-out  
- Checked by Outbound & Real-time journeys*

Contact based consent

Tracking

**SW Sally Wright** - Saved  
Contact

Summary Details Insights Events attended Files **GDPR consent change records** Related

Show Chart Refresh Flow Run Report Excel Templates Export GDPR consent

**GDPR consent change record associated view**

Name	Created on	Value	Source
Create contact	9/17/2023 8:21 PM	(4) Marketing	Integration
Update contact	9/17/2023 8:24 PM	(4) Marketing	D365 Marketing Form
Update contact	9/17/2023 8:36 PM	(2) Transactional	Contact form

Contact point consent

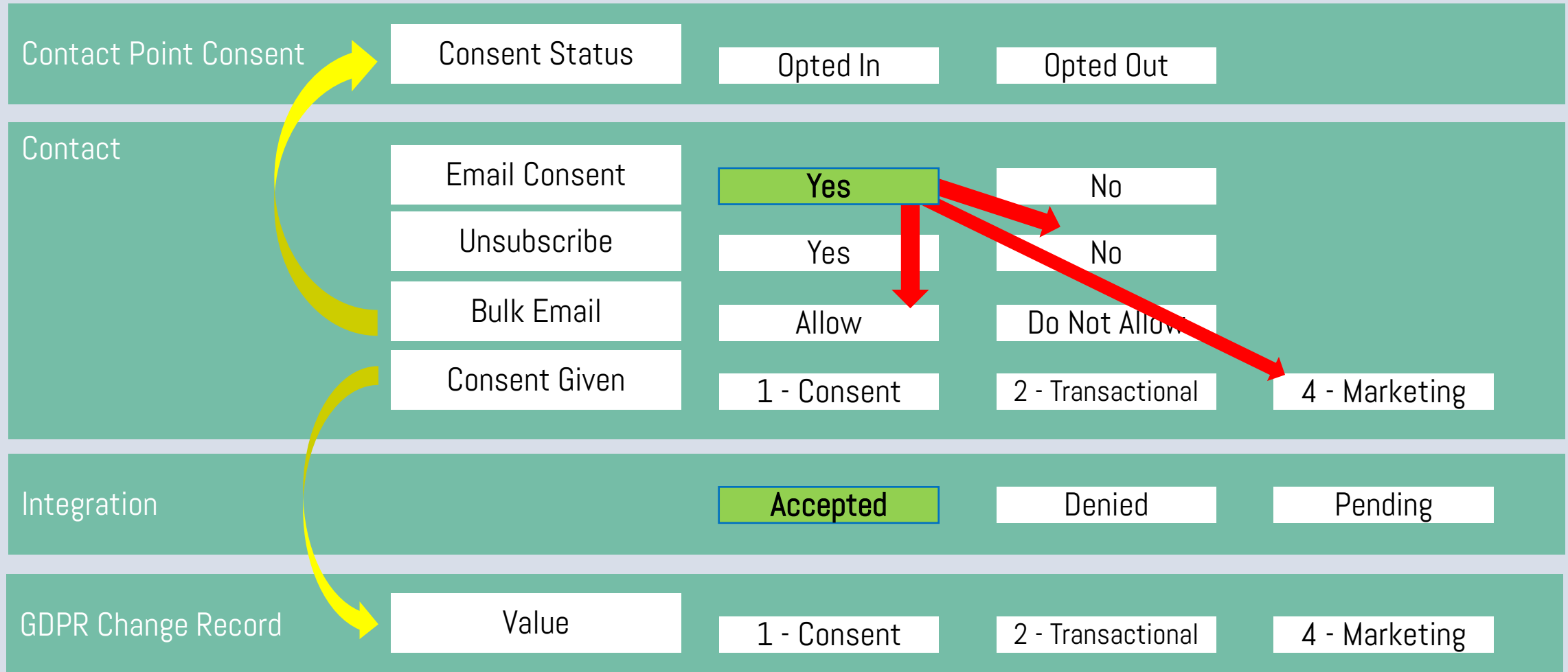
Respected by

Real-time journeys

**Active Contact Point Consents\***

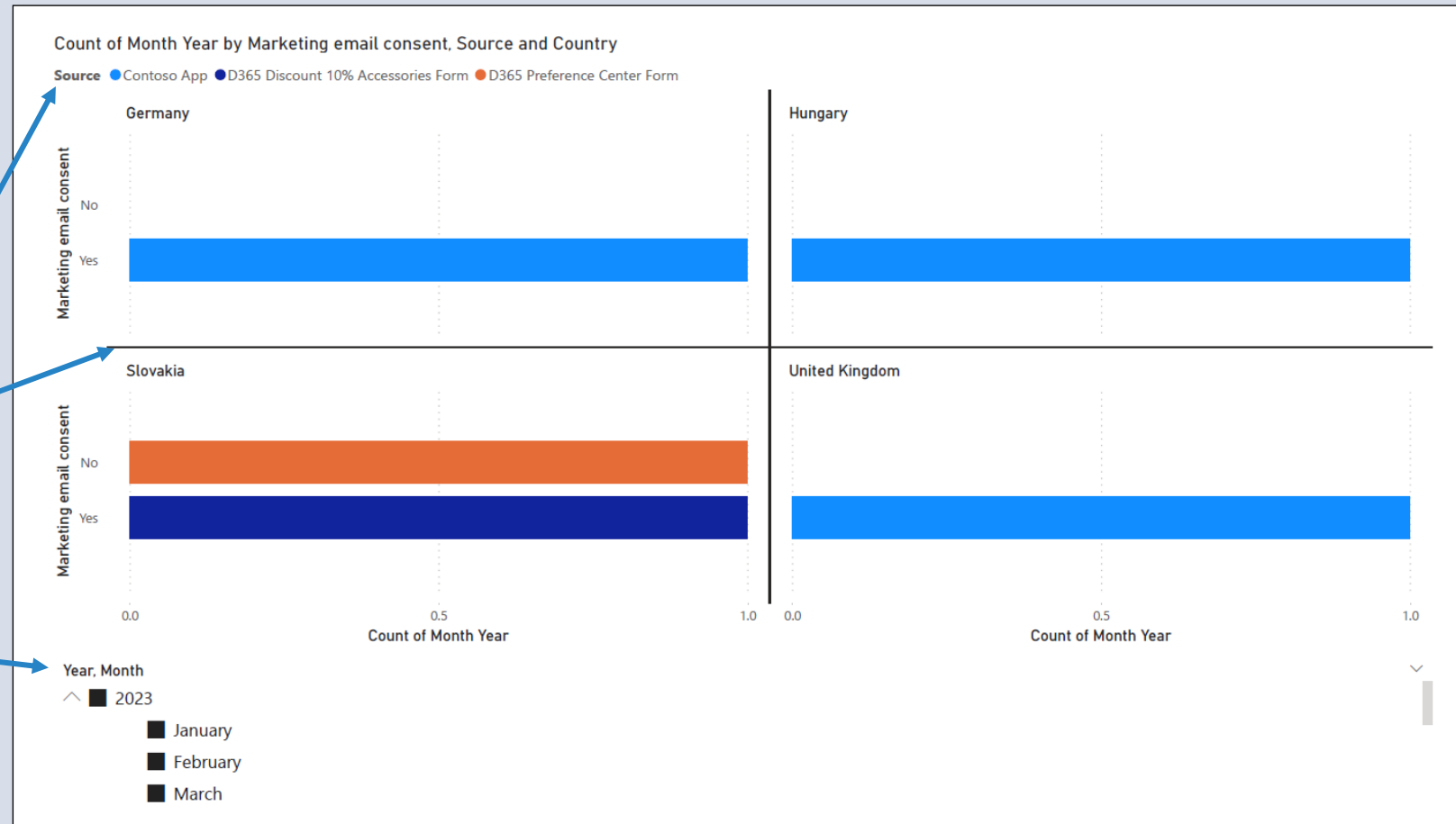
Contact point	Channel	Consent type	Purpose	Topic	Consent status	Source	Modified On
roxel85038@ipnuc.com	Email	Purpose	Commercial		Opted Out	Internal	9/17/2023 8:35...
roxel85038@ipnuc.com	Email	Purpose	Tracking		Opted In	Internal	9/17/2023 8:21...

# Contoso's D365 consent



# Contoso's D365 Marketing email consent dashboard

- Such solution also allows Contoso to gain overview of the related Marketing email consent trends, which can be used for optimization,
  - across **Opt-in and Opt-out touch-points**
  - geographically
  - over **time**



# Consent freely given by Sally



Sally Wright

Sally purchased a product

Sally downloaded an app post purchase and subscribed to Contoso's Newsletter (opt-in)

External website

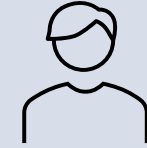
After 2 weeks she received a notification about 10% discount

She decided to opt out from all marketing communication

After submission she automatically received a Thank you email with option to change her consent preferences

She filled the form where she updated her marketing consent (opt-in)

D365 Marketing & Customer Insights



D365 MKT User

D365 MKT user can see all changes created by Sally in D365 MKT and follow what she did and when.




### Your Temporary Email Address


xajeka7715@twugg.com





Your Temporary Email Address


Forget about spam, advertising mailings, hacking and attacking robots. Keep your real mailbox clean and secure. Temp Mail provides temporary, secure, anonymous, free, disposable email address.

 Copy

 Refresh

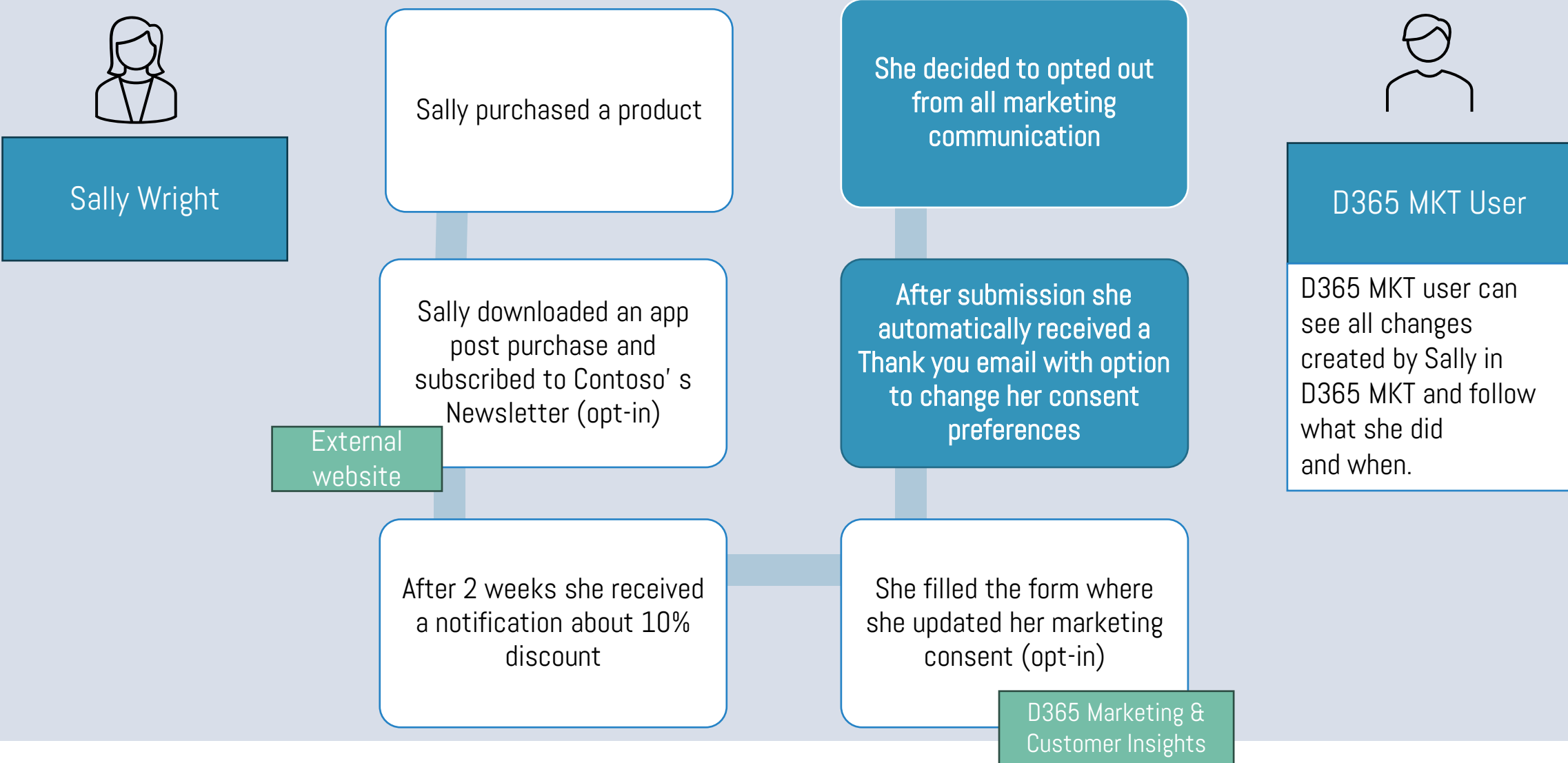
 Change

 Delete

SENDER	SUBJECT	VIEW
		

Consent freely given by Sally

# Previously given consent was withdrawn by Sally



- Recent
- Pinned
- Engagement
  - Get started
  - Journeys
  - Analytics
  - Triggers
- Audience
  - Segments
  - Contacts
  - Leads
  - Consent center
- Lead Management
  - Scoring models
- Channels
  - Real-time marketi...

Read-only This record's status: Live

### UK\_Newsletter with 10% discount on accessories

Version 3 (current) ● Live

Current version inflow: 5 (out of 9 total)

**Entry**

Analytics Properties

5 Inflow	0 Processing	5 Processed
----------	--------------	-------------

Unique customers ①

5 (100% of inflow)

```
graph TD; A[Trigger Marketing Form Submitted] -- 5 --> B[Wait 1 minute]; B -- 4 --> C[Send an email Thank you for signing up!];
```

100% Reset

Previously given consent was withdrawn by Sally

# Documentary evidence of Sally's consent preferences



Sally Wright

Sally purchased a product

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External website

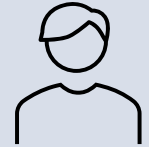
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D365 Marketing & Customer Insights



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  - Leads
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- Lead Management
  - Scoring models
- Channels
  - Real-time marketi...

← 📄 🗑️ Save Save & Close + New 🗑️ Open org chart 🗑️ Deactivate 🗑️ Lists and segments 🗑️ Connect | 🗑️ Assign ⋮ Share 🗨️

**SW** **Sally Wright** - Saved  
Contact

**A** **andras #**  
Owner

- Summary** Details Insights Events attended Files GDPR consent change records Related

CONTACT INFORMATION	
First Name	Sally
Last Name	Wright
Job Title	---
Account Name	---
Email	roxel85038@ipnu... 📧
Business Phone	---
Mobile Phone	---
Fax	---
Preferred Method of Contact	Any

**Timeline** + 🗑️ 📄 ⋮

🔍 Search timeline

📝 Enter a note... 📎

- SW** 📧 Email link clicked by Sally Wright  
[Thank you for signing up!](#)  
9/17/2023 8:35 PM  
View more
- SW** 📧 Email opened by Sally Wright  
[Thank you for signing up!](#)  
9/17/2023 8:35 PM  
View more
- 📧** 📧 Email delivered  
[Thank you for signing up!](#)  
9/17/2023 8:28 PM  
View more

**Who Knows Whom**

No connections found  
Insufficient privileges. Contact your admin...  
[Learn More.](#)

**Assistant**

Notifications

No notifications or suggestions  
Check back later to see what's new and stay up to date.

**Company**

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Documentary evidence of Sally's consent preferences

# Transition to Customer Insights - Journeys

1 - Populate Contact Point Consent

Initial load from sources



2- Transition after July 2023

Purpose & Topics

Security, Logic and UI



3 – Implement full CPC based solution

Move from OTB to RTM

Playbook from Microsoft

# Lessons learned

D365  
updates  
frequently  
(CPC)

Binding  
limitations  
(D365M,  
Dataverse)

Understand  
your data  
and  
customers

Involve  
legal  
stakeholder  
early on

# GDPR Compliance framework

GDPR-related theme	Considerations	Tips
<b>Legitimate / Consent purposes</b>	<b>Commercial</b> , Transactional and Tracking	Marketing lists into topics
<b>Consent types</b>	Channels used for commercial marketing	<b>Email</b> , Phone and Custom channel
<b>Consent sources</b>	Opt-in processes & touch-points	Harmonize the data, master model
Consent data flows	Latest consent status touch-point visibility	Opt-in & Opt-out touch-points
<b>Consent management</b>	Opt-out processes & touch-points	Differentiate between global, purpose and topic
<b>Consent tracking</b>	Legal and business requirements	Burden of proof and reconsenting
Reconsenting	Conditions for consent resubmission	Utilize consent tracking
Data retention	Conditions for personal data to be retained	Reconsenting and activities from other apps
Local markets	Exceptions required for some markets	US as an example with opt-out rather than opt-in





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Q&A



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**THANK YOU!**