



Korcomptenz



Education client boost sales and marketing with Microsoft Dynamics 365

See how we helped a education non-profit organization integrate event hub, Zoom and marketing module to improve customer engagement



Client Overview

Industry	: Non-profit
HQ Location	: United States
Size of the Company	: Mid-size
Systems + Devices Addressed	: Microsoft Dynamics 365 CE, Microsoft Dynamics 365 Marketing and Event Hub, Microsoft Teams, Zoom, Power App Portals

Company Overview

The client is a non-profit that represents the interests of liberal arts education in the United States. The Client organizes members to align around liberal arts goals and offers scholarships to underserved communities. The Client was using proprietary software to manage events and meetings. The software was organized around in-person events and **had little facility to support virtual meetings** that have become increasingly popular especially during the pandemic. In addition, the older software was not fully integrated with their Microsoft Dynamics 365 CE platform.

- Legacy event software with limited capabilities and no integration with CRM software
- No support for virtual meetings or integration with popular meeting platforms like Microsoft Teams and Zoom
- Cumbersome event management and invite process with gaps in the data
- No consolidated end-to-end event planning and reporting capabilities

Key Objectives

The in-person or virtual events are managed by multiple stakeholders throughout the organization, and special attention was needed to ensure support for multiple types of events, through integration with everyone's unique ZOOM account, segmentation of potential attendees, and comprehensive reporting. The overall objectives of the project were: -



- To **provide a comprehensive means** to manage all aspects of in-person and virtual events.
- **Configuration and creation** of events, promotion, and outreach to potential participants in the organization's database including event registration and reporting on attendance.
- **Integration of event management module** with contacts and accounts from the Client's existing Microsoft Dynamics 365 Customer Engagement (MSCRM) application.

Solution

Korcomptenz partnered with the Client to review software options on the market and helped identify **Microsoft Dynamics 365 CE Marketing and Event Hub with a custom Zoom integration** as the optimal choice.

Korcomptenz was selected as the partner of choice to deploy Microsoft Dynamics CE Marketing and Event Hub and to integrate the software with Zoom. Microsoft Dynamics CE Event Hub includes out-of-the-box integration with Microsoft Teams and a customizable architecture that easily supports third party systems like Zoom. The project included:

◆ Marketing Hub implementation and configuration

◆ Event Hub implementation and configuration

◆ Microsoft Teams and Zoom integration

◆ Power App portal design and implementation

About Microsoft Dynamics 365 Marketing and Event Hub

Microsoft Dynamics 365 Marketing and Event Hub is the only event management and promotion solution fully integrated with an industry-leading CRM. The powerful, flexible platform offers organizations the ability to:

Orchestrate real time customer-led journeys

Design customer-led experiences

Deliver seamless omni channel experiences

Turn event, meeting, and webinar attendees into loyal customers

Improve customer communications and analytics

Nurture leads, accounts and customers



Measurable Results

The new implementation of Microsoft Dynamics 365 Marketing and Event Hub was immediately put to use by all stakeholders in the organization. Further, the solution supported the creation, management, and registration of much more complex event types with much more advanced reporting. The result was a more streamlined and efficient way to manage events, plus a more comprehensive view of their accounts and contacts and event data.

- 1 Superior Event Management solution adopted to manage events through disparate systems, promoting events outside the CRM
- 2 New virtual event support and integration with Zoom
- 3 Consolidating event marketing, registration, and attendance controls
- 4 Integrated reporting throughout the entire event life cycle



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We #FocusOnYou

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