

DYNAMICS 365

CUSTOMER INSIGHTS

Checklist



Technical readiness

Foundations and installation

- ☐ Validate licenses
- ☐ Confirm tenant(s) and environment strategy: DEV / TEST / PROD
- ☐ Create/assign security roles (least privilege)
- ☐ Set feature switches
- ☐ Set up tracking and analytics (e.g. UTMs)

Consent and compliance

- ☐ Create compliance profile(s) with enforcement model, purposes and topics
- ☐ Create preference center
- ☐ Set up double opt-in (if required)
- ☐ Migrate existing consents if available

Content and delivery

- ☐ Authenticate domains
- ☐ Set up brand profile(s): sender, reply-to
- ☐ Configure marketing settings: suppression rules, frequency caps etc. (if used).
- ☐ Deliverability plan: warm-up schedule
- ☐ Verify field personalisation formatting
- ☐ Set up templates for emails, forms, journeys, content blocks
- ☐ Decide naming conventions
- ☐ Inventory reusable content: templates, modules, brand elements, disclaimers.

Forms & journeys

- ☐ Configure forms with double opt-in (if needed) and map fields to correct tables.
- ☐ Define hosting approach (form capture or embedding) and tracking needs.
- ☐ Validate CAPTCHA/spam protection approach.
- ☐ Define segment strategy rules: when to use segment vs trigger

Go-live controls

- ☐ Run shadow sessions during first real builds in PROD: observe, don't lecture.
- ☐ Cutover plan (who does what, when, rollback conditions).
- ☐ Support model: triage channel, escalation contacts, SLAs.

People-first delivery

Purpose and ownership

- ☐ Define 3–5 measurable outcomes (e.g. reduced manual effort, opt-in growth).
- ☐ Define what “success in 90 days after go-live” looks like (in plain language).
- ☐ Define RACI and map stakeholders
- ☐ “Who can activate what” rules are clear and enforced.
- ☐ Confirm who will run the platform post go-live

Way of working & current state

- ☐ Establish a weekly cadence: co-creation sessions + show & tell + backlog refinement.
- ☐ Shadow existing process: how campaigns are built today (tools, handoffs, approvals, pain points).
- ☐ Identify “hidden work”: spreadsheets, manual exports, copy/paste lists, approvals via email.

Use-case selection & co-creation

- ☐ Pick one thin-slice journey as the first deliverable
- ☐ Define what is out of scope for MVP
- ☐ Run build sessions where marketing users build parts themselves
- ☐ Make the first journey real: real content, real audience slice, real tracking.
- ☐ Keep a “learning log”: what confused users, what broke, what was unclear.
- ☐ Ensure users practice troubleshooting: test contacts, suppression, consent outcomes, bounce cases.

Change management

- ☐ Create a communication plan (who needs updates, what cadence, what decisions).
- ☐ Set expectations early: “This is a capability rollout, not a one-time project.”
- ☐ Identify internal champions (“super users”)
- ☐ Define minimum competency per role
- ☐ Create learning and training plan

