

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. UTM)

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

