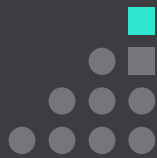


Dynamics 365 for Finance and Operations

Event guide



Please consider the information in this kit a framework, not a fully-packaged standalone event. Please use it to create your own Dynamics 365 event that is tightly aligned with this guidance, a Dynamics 365 event with your unique spin, or another event that is better aligned to serve you and your customers.



Resources

Hosting a Dynamics 365 for Finance and Operations event

Schedule

Checklist

Event assets

Abstract

Agenda

Registration page

Feedback form

Marketing assets

Invites

Social

Banner

Hosting a Dynamics 365 for Finance and Operations event

Hosting a Dynamics 365 for Finance and Operations event

Thank you for your interest in hosting a Microsoft Dynamics 365 for Finance and Operations event. Our objective with this event kit is to provide partners with a framework for hosting a Dynamics 365 for Finance and Operations event of your own.

This event kit will provide guidance on hosting a successful event and resources to help you pull it off, including a workback schedule, a to-do checklist, an event abstract and agenda, and assets to help you market your event.

Making it your own

Please consider the information in this kit a framework. To the extent which it is useful, feel free to use it to create a Dynamics 365 for Finance and Operations event that is tightly aligned with this guidance, a Dynamics 365 for Finance and Operations event with your unique spin, or another event that is better aligned to serve you and your customers.

Topics to consider:

- Finance and/or manufacturing trends
- Take your supply chain management to the next level
- How to know when you've outgrown your accounting software?
- Improve demand forecasting
- The Fourth Industrial Revolution

Other resources

Event guide

Documents

- Schedule + Checklist
- Event overview
 - Abstract
 - Agenda

Marketing

- Invite emails
- Social posts
- Banners
 - Emails
 - Social
- Registration/Feedback

The following are examples to provide guidance as you create your own events.



Schedule + Checklist

Pre-event

-6 weeks

- ☐ Set date for event
- ☐ Secure venue
- ☐ Confirm speakers
- ☐ Set agenda
- ☐ Determine invite list
- ☐ Write event copy
- ☐ Determine demand gen strategy

-5 weeks

- ☐ Launch registration page
- ☐ Send initial invites

-4 weeks

- ☐ Contact catering
- ☐ Order swag
- ☐ Organize security
- ☐ Schedule social posts

-2 weeks

- ☐ Lock slides
- ☐ Provide catering info to venue
- ☐ Send second invites

-3 days

- ☐ Provide guest list to venue
- ☐ Send reminder emails
- ☐ Launch post-event survey

Day of event

- ☐ Provide attendees with WiFi password
- ☐ Create hashtag and encourage attendees to share
- ☐ Take pictures during the event and share them on social

Post-event

+1 day

- ☐ Send follow-up emails with survey request

Checklist

Event logistics

- ☐ Event date and time
- ☐ Event venue
- ☐ Invite list
- ☐ Catering
 - ☐ Consider dietary restrictions
- ☐ Security

Programming

- ☐ Speakers
- ☐ Agenda
- ☐ Slide templates

Marketing

- ☐ Registration page
- ☐ Feedback form
- ☐ Social media posts
 - ☐ Create hashtag
- ☐ Emails
 - ☐ Invite
 - ☐ Second invite
 - ☐ Registration confirmation
 - ☐ Reminder
 - ☐ Thank you
 - ☐ *Optional: Waitlisted, Rejected, Change location or schedule, Cancellation confirmation, Event cancellation, Sorry we missed you*
- ☐ Swag (*Optional*)
 - ☐ Pens, stickers, power packs, USB sticks

Experience

- ☐ Name tags
- ☐ Internet connectivity/WiFi
- ☐ Signage (*Optional*)
 - ☐ Welcome signs, posters



Event assets

Abstract
Agenda
Registration page
Feedback form

The following are examples to provide guidance as you create your own events.



Abstract + Agenda

Abstract

Unify global financials and operations to empower people to make fast, informed decisions.

The speed of doing business is increasing. As companies seek to stay competitive, they must rely on technology to provide the agility and capabilities needed to excel. However, many organizations are still running on ERP systems that are complex, inflexible, and impede their ability to innovate and grow.

We'd like to invite you and your team to participate in our Dynamics 365 for Finance and Operations Summit. The summit is designed to equip you and your team with the knowledge and tools necessary to accelerate the speed of doing business by empowering people to make smarter decisions, transform business processes faster, and drive business growth.

During this event you will learn how to:

- **Inspire:** Get inspired by new ideas and success stories of modern businesses leveraging technology to drive growth.
- **Discover:** Discover opportunities to elevate your financial performance; run smarter, connected operations; automate and streamline your supply chain, and deliver unmatched workforce productivity.
- **Experiment:** Try the latest tools from Microsoft Dynamics 365 for Finance and Operations.

Agenda

AM Event	PM Event	Schedule
08:00 AM	12:00 PM	Registration & Breakfast/Lunch
09:15 AM	01:15 PM	Welcome
09:30 AM	01:30 PM	Inspire session
10:30 AM	02:30 PM	Discover session
11:15 AM	03:15 PM	Break
11:30 AM	03:30 PM	Experiment session
12:45 PM	04:45 PM	Closing
01:00 PM	05:00 PM	Reception & Networking



Registration page



Partner logo

Dynamics 365 for Finance and Operations Summit

Register today!

Unify global financials and operations to empower people to make fast, informed decisions.

The speed of doing business is increasing. As companies seek to stay competitive, they must rely on technology to provide the agility and capabilities needed to excel. However, many organizations are still running on ERP systems that are complex, inflexible, and impede their ability to innovate and grow.

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Agenda

PM Event	Schedule
12:00 PM	Registration & Breakfast/Lunch
01:15 PM	Welcome
01:30 PM	Inspire session
02:30 PM	Discover session
03:15 PM	Break
03:30 PM	Experiment session
04:45 PM	Closing
05:00 PM	Reception & Networking

Register

Name

Company

Title

Email

Submit

Details

When

February 7, 2019 | 12:00 PM - 5:00 PM PST

Where

Microsoft Training Center
700 Bellevue Way NE
Bellevue, WA 98004



Feedback form



Partner logo

Dynamics 365 for Finance and Operations Summit

Thank you for attending our Dynamics 365 for Finance and Operations Summit. We invite you to complete a brief survey to provide feedback on your experience. As a note, this survey is not anonymous.

How satisfied were you with this event? *

☐ Very satisfied ☐ Somewhat satisfied ☐ Somewhat dissatisfied ☐ Very dissatisfied

How strongly would you agree that attending the event has motivated you to either recommend, try, purchase, or deploy Microsoft products and/or services? *

☐ Strongly agree ☐ Somewhat agree ☐ Neutral ☐ Somewhat disagree ☐ Strongly disagree

Did you achieve your objectives for attending this event? *

☐ Yes ☐ No

Did you find the Dynamics 365 for Finance and Operations Summit and content valuable?

☐ Highly valuable ☐ Valuable ☐ Low value

Which sections of the Dynamics 365 for Finance and Operations Summit did you find most relevant?

☐ All of them ☐ Excite ☐ Explore ☐ Experiment ☐ None

Which emerging technologies are you most interested in?

As a result of attending the Dynamics 365 for Finance and Operations Summit, how likely are you to deliver this content to your organization?

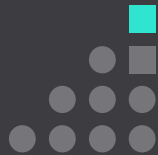
☐ Highly likely ☐ Likely ☐ Not at all

Would you like us to send you the Dynamics 365 for Finance and Operations Toolkit?

☐ Yes ☐ No

Would you like to share any other comments or feedback about the Dynamics 365 for Finance and Operations Summit?

Submit



Marketing assets

Invites
Social
Banners

The following are examples to provide guidance as you create your own events.



Invites

Emails

Invitations

- Invite
- Second invite

Auto responses

- Registration confirmation
- Waitlisted
- Rejected
- Event reminder

Changes

- Change location or schedule
- Registration has been cancelled
- Event cancelled

Follow-up

- Registered, did not attend
- Thank you for attending

Invitations

Invite

Subject line: Invitation to the Dynamics 365 for Finance and Operations Summit

Dear [NAME],

We'd like to invite you and your team to participate in our Dynamics 365 for Finance and Operations Summit. The summit is designed to equip you and your team with the knowledge and tools necessary to accelerate the speed of doing business by empowering people to make smarter decisions, transform business processes faster, and drive business growth. During the summit, we will explore new ideas in finance and operations; share success stories; discover opportunities to elevate your financial performance, run smarter connected operations, automate and streamline your supply chain, and deliver unmatched workforce productivity; and demo the latest tools from Dynamics 365 for Finance and Operations.

When

[DATE]

[TIME]

Where

[ADDRESS]

This is an event you don't want to miss! We encourage you to register right away, as space is limited. Event details and registration information is here [LINK]. We hope to see you at the Dynamics 365 for Finance and Operations Summit!

Best Regards,

[NAME]

Unsubscribe | Privacy Statement

[PARTNER NAME]

[PARTNER ADDRESS]



Invites

Invitations

Second invite

Subject line: Registration Closing Soon: Dynamics 365 for Finance and Operations Summit

Dear [NAME],

I hope things are going well for you.

We're just a couple weeks away from our Dynamics 365 for Finance and Operations Summit, and I wanted to give you a heads up that registration will be closing soon. If you're planning to attend, please register [\[LINK\]](#) today!

One last thing: A few customers have reached out wondering if there is a fee to attending this event. There is no fee and attendance is absolutely free.

When

[DATE]

[TIME]

Where

[ADDRESS]

Hope to see you at the Summit!

Best Regards,

[NAME]

[Unsubscribe](#) | [Privacy Statement](#)

[PARTNER NAME]

[PARTNER ADDRESS]



Invites

Auto responses

Registration confirmation

Subject line: Dynamics 365 for Finance and Operations Summit: Registration confirmation

Thank you for registering. This email confirms your registration for the following event:

Dynamics 365 for Finance and Operations Summit

[ADDRESS]

[DATE]

[TIME]

We look forward to seeing you at the event! If plans change and you are unable to attend, please use the link below to cancel your registration.

[\[Cancel my registration\]](#)

Auto responses

Waitlisted

Subject line: Dynamics 365 for Finance and Operations Summit: Registration pending

Thank you for your interest in attending our upcoming Dynamics 365 for Finance and Operations Summit. Due to the popularity of this event, your registration cannot be automatically confirmed. You will be notified by email if there is capacity for you to attend.

Dynamics 365 for Finance and Operations Summit

[ADDRESS]

[DATE]

[TIME]

Thank you again for your interest.



Invites

Auto responses Rejected

Subject line: Dynamics 365 for Finance and Operations Summit

Thank you for your interest in attending the Dynamics 365 for Finance and Operations Summit. Unfortunately, due to the popularity of this event we are unable to accommodate your request to attend.

Dynamics 365 for Finance and Operations Summit
[ADDRESS]

[DATE]
[TIME]

We apologize for any inconvenience this may have caused and look forward to seeing you at future events. Please visit our website if you are interested in learning more about other events and webcasts.

Auto responses Event reminder

Subject line: Dynamics 365 for Finance and Operations Summit: Reminder

Thank you for your interest in our Dynamics 365 for Finance and Operations Summit. We would like to remind you that you are registered for the following event:

Dynamics 365 for Finance and Operations Summit
[ADDRESS]

[DATE]
[TIME]

We look forward to seeing you at the event! If plans change and you are unable to attend, please use the link below to cancel your registration.
[Cancel my registration]



Invites

Changes

Change location or schedule

Subject line: Dynamics 365 for Finance and Operations Summit: New location/New schedule

The Dynamics 365 for Finance and Operations for which you are registered has changed location and/or schedule. Please see the new event details below:

Dynamics 365 for Finance and Operations Summit

[ADDRESS]

[DATE]

[TIME]

We apologize for any inconvenience to you and your schedule. If you are unable to attend, please use the link below to cancel your registration.

[Cancel my registration]

Changes

Registration has been cancelled

Subject line: Dynamics 365 for Finance and Operations Summit: Cancellation confirmation

This confirms your registration has been cancelled for the following event:

Dynamics 365 for Finance and Operations Summit

[ADDRESS]

[DATE]

[TIME]

We look forward to seeing you at an event in the future! Please visit our [website] if you are interested in learning more about other events and webcasts.



Invites

Changes

Event cancelled

Subject line: Dynamics 365 for Finance and Operations Summit cancelled

We regret to inform you that our Dynamics 365 for Finance and Operations Summit has been cancelled.

Dynamics 365 for Finance and Operations Summit

[ADDRESS]

[DATE]

[TIME]

We apologize for any inconvenience. We will be sure to notify you if this event is re-scheduled for a later date. Please visit our [\[website\]](#) if you are interested in learning more about other events and webcasts.

Follow-up

Registered, did not attend

Subject line: Dynamics 365 for Finance and Operations Summit: Sorry we missed you

Our records indicate that you were registered for the following event but did not attend:

Dynamics 365 for Finance and Operations Summit

[ADDRESS]

[DATE]

[TIME]

Please visit our [\[website\]](#) if you are interested in learning more about other events and webcasts. We look forward to seeing you at one of our future events!



Invites

Follow-up

Thank you for attending

Subject line: Dynamics 365 for Finance and Operations Summit: Thank you for attending!

Thank you for attending the following event:

Dynamics 365 for Finance and Operations Summit

[ADDRESS]

[DATE]

[TIME]

If you did not get a chance to provide feedback the day of the event, please let us know what you thought of everything via our [\[survey\]](#).

We hope that you found this event valuable and informative. Please visit our [\[website\]](#) if you are interested in learning more about other events and webcasts.

We look forward to seeing you again in the future!



Social + Banners

Twitter

Did you know that you can decrease your operating costs by 20-30% by modernizing your ERP? Learn how to automate and streamline your supply chain at our Dynamics 365 for Finance and Operations Summit on [DATE]. Register today!

Register for our Dynamics 365 for Finance and Operations Summit. At the summit, you will learn how to accelerate the speed of doing business by empowering people to make smarter decisions, transform business processes faster, and drive business growth.

Get inspired and discover new opportunities to accelerate your business growth at our Dynamics 365 for Finance and Operations Summit on [DATE]. Space is limited.

Did you know that organizations embracing digital transformation generate an average of \$100M more income each year? Discover what digital transformation could mean for your business at our Dynamics 365 for Finance and Operations Summit on [DATE]. Register [here].

Unify global financials and operations to empower fast, informed decisions, adapt quickly to changing market demands, and drive business growth. Register for our Dynamics 365 for Finance and Operations Summit and learn how to accelerate your business growth.

Facebook + LinkedIn

Title: Unify global financials and operations to empower people to make fast, informed decisions.

We'd like to invite you and your team to participate in our Dynamics 365 for Finance and Operations Summit. The summit is designed to equip you and your team with the knowledge and tools necessary to accelerate the speed of doing business by empowering people to make smarter decisions, transform business processes faster, and drive business growth.

During this event you will learn how to:

- Inspire: Get inspired by new ideas and success stories of modern businesses leveraging technology to drive growth.
- Discover: Discover opportunities to elevate your financial performance; run smarter, connected operations; automate and streamline your supply chain, and deliver unmatched workforce productivity.
- Experiment: Try the latest tools from Microsoft Dynamics 365 for Finance and Operations.

Learn more and register at the link below.

Banner



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