

Saving Time with Seamless Dynamics 365 CRM & Mailchimp Synchronization



This app has saved us a tremendous amount of time! Our contacts easily and reliably sync between our CRM and MailChimp. Although it typically works flawlessly, there have been a few instances where we made changes within our environment that required us to request support. The Inogic team has been very responsive and helped resolve our problems quickly and completely. I highly recommend this app!

-Josh Argall

ABOUT PATIENT ADVOCACY STRATEGIES ✓

Patient Advocacy Strategies is a U.S.-based biopharma consulting company that helps biotechnology and pharmaceutical organizations strengthen patient engagement throughout the drug development lifecycle. Since its establishment in 2015, the company has partnered with life sciences organizations to support clinical trial recruitment, patient advocacy, stakeholder engagement, and commercialization initiatives. By building meaningful relationships with patients, caregivers, advocacy groups, and healthcare communities, Patient Advocacy Strategies helps clients make informed, patient-centric decisions that accelerate research and improve treatment development.

Industry: Biopharma Consulting | Healthcare Consulting

Specialties: Clinical trial recruitment, patient advocacy, patient engagement, healthcare communications, stakeholder engagement, and life sciences consulting.

BUSINESS CHALLENGE ✓

Patient Advocacy Strategies manages a growing network of nearly 10,000 healthcare and life sciences contacts in Microsoft Dynamics 365 CRM. The organization regularly uses promotional email campaigns to engage healthcare professionals, advocacy groups, and industry stakeholders. To ensure every campaign reached the right audience, the company needed customer information to remain synchronized between Microsoft Dynamics 365 CRM and Mailchimp. They also wanted campaign engagement data to be easily accessible within Dynamics 365 CRM, allowing the team to review marketing performance without switching between multiple applications.

SOLUTION

To streamline its marketing operations, Patient Advocacy Strategies implemented Marketing4Dynamics, integrating Microsoft Dynamics 365 CRM with Mailchimp to create a connected and efficient marketing workflow.



- ✓ **Maintained a single source of truth for customer data:** With nearly 10,000 contacts stored in Dynamics 365 CRM, keeping marketing data accurate was essential. Marketing4Dynamics synchronized customer records between Dynamics 365 CRM and Mailchimp, helping ensure promotional campaigns were always based on the latest available contact information.
- ✓ **Connected Microsoft Dynamics 365 CRM and Mailchimp:** Instead of managing customer information across disconnected systems, Marketing4Dynamics established seamless integration between the CRM and Mailchimp, allowing both platforms to stay aligned while supporting the organization's existing marketing processes.
- ✓ **Improved confidence in promotional email campaigns:** Because customer information remained synchronized, the marketing team could send promotional emails knowing their mailing lists reflected current CRM data, helping improve the reliability of campaign execution.
- ✓ **Centralized campaign analytics inside Dynamics 365 CRM:** Marketing4Dynamics synchronized Mailchimp engagement data back into Dynamics 365 CRM, enabling users to review campaign performance directly from the CRM instead of navigating between multiple applications.
- ✓ **Simplified day-to-day marketing operations:** By reducing the effort required to maintain consistent customer information across systems, the solution made ongoing campaign management more efficient and allowed the team to spend more time on marketing activities rather than managing data.
- ✓ **Delivered reliable product support:** Throughout their implementation and day-to-day usage, the team benefited from Inogic's responsive support and comprehensive documentation. Clear guidance, detailed knowledge base articles, and step-by-step resources helped users quickly resolve questions and confidently continue using the solution.

CONCLUSION ✓

By implementing Marketing4Dynamics, Patient Advocacy Strategies successfully connected Microsoft Dynamics 365 CRM and Mailchimp into a unified marketing environment.



The solution helped the organization maintain accurate customer data, simplify promotional email marketing, and access campaign analytics directly within Dynamics 365 CRM. Combined with dependable product support and comprehensive documentation, Marketing4Dynamics has provided Patient Advocacy Strategies with a scalable platform that supports its current outreach efforts while enabling future expansion of its marketing capabilities.

