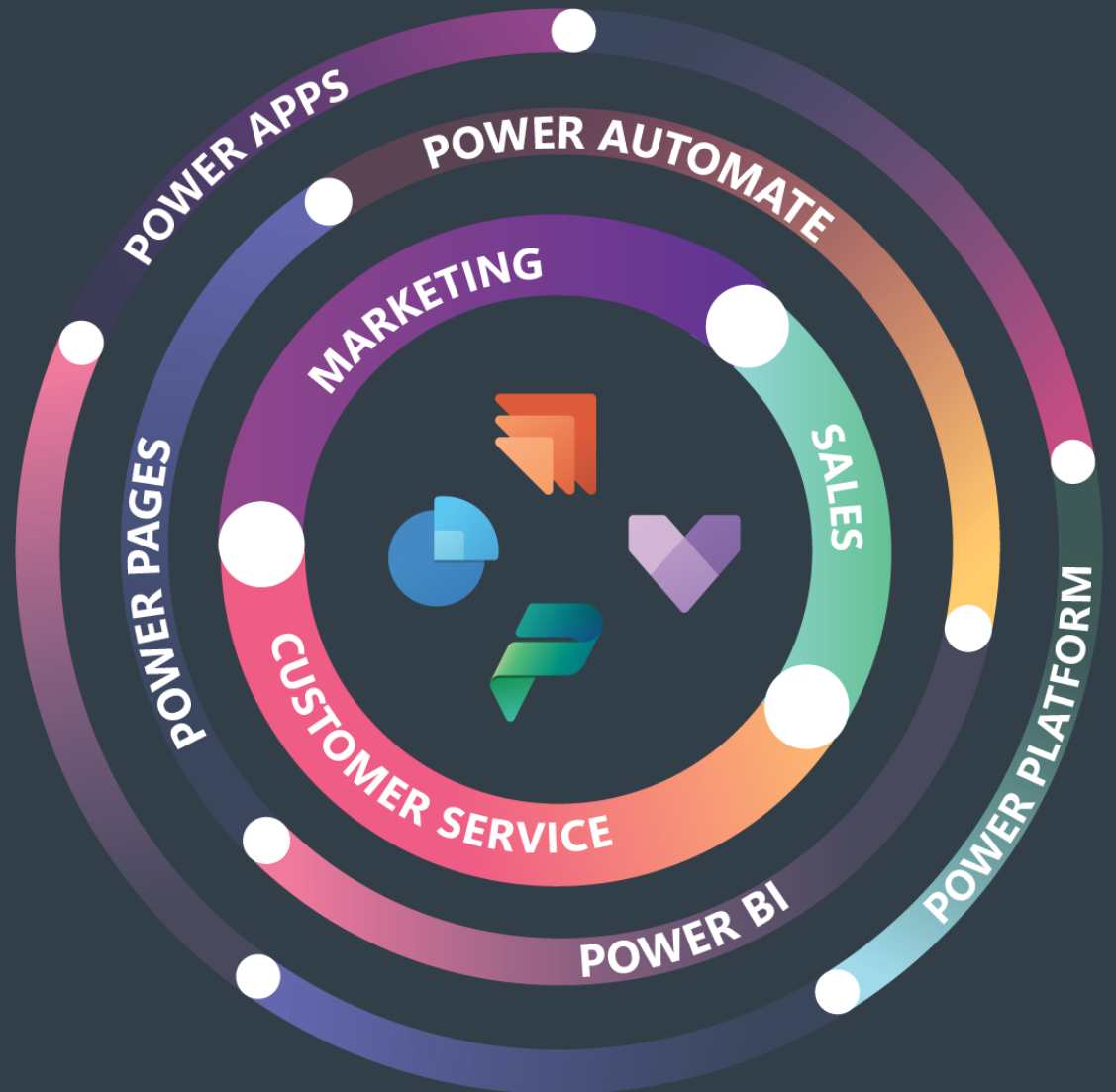


CRM connect

Unlock Customer Insights with Dynamics 365

Harness the Power of Data for Enhanced Customer Relationships





Hi!

I'm Stuart Starforth!,
I'm Colin Bell!

What we'll cover

1. Why is Customer Data hard to manage?
2. What is Customer Insight – Data and its Purpose
3. How can Customer Insights - Data help?
4. What's Exciting (Unify, Segments, Co Pilot)
5. Your data, your preference





 Microsoft
Dynamics 365

Why is Customer Data hard to manage?

Fragmented Data

A mere 13% of Organisations have a high level of understanding of their customers data

Lack of extraction

47% of consumers cited a difficulty in extracting data from source systems as their biggest challenge

Unable to Collate

63% struggle to pull all their source data together effectively



What is Customer Insights - Data?

What is Customer Insights - Data?

What is it?

Microsoft Dynamics 365 Customer Insights is a cloud-based customer data platform designed to help businesses gain a 360-degree view of their customers by unifying data from various sources such as transactions, interactions, and demographics.

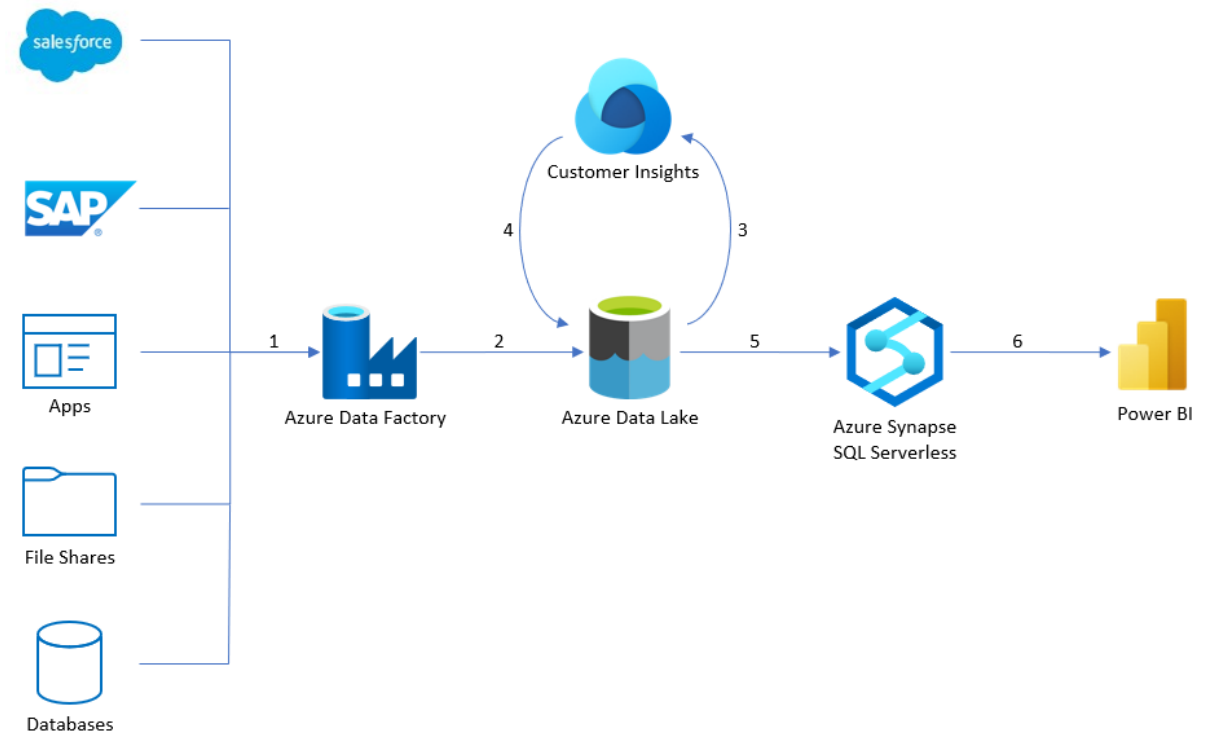
What is its purpose?

Microsoft Dynamics 365 Customer Insights is designed for businesses across various industries that aim to enhance customer engagement, drive loyalty, and improve business outcomes.

It caters to organizations seeking to leverage their customer data to deliver personalized experiences, improve marketing effectiveness, and increase customer lifetime value.

Seamless Integration

- Microsoft Dynamics 365 CRM
- Microsoft Azure
- Adobe Experience Platform



Security and Compliance

Overview of security measures and compliance standards adhered to by Customer Insights:

- Data Encryption
- GDPR Compliance
- SOC 2 Certification





Understanding Dynamics 365 Customer Insights & how it can help?

Understanding Dynamics 365 Customer Insights



Customer Insights is a robust customer data platform (CDP) designed to aggregate and analyse customer data from various sources.



Customer Insight – Data, allows you to capture and collate data to formulate a proactive plan to drive revenue growth from existing clients whilst allowing you to analyse base performances



In September 2023, Customer Insights and Marketing were amalgamated into one license.

How can Customer Insights – Data help?

- Enable streamlined data collaboration
- 360-degree view of client data
- Key insights into client engagement and their peaks and troughs
- AI-Powered Insights
- Predictive Analytics
- Potential to increase Revenue and decrease costs
- Enables Automated marketing campaigns from the data provided





Know your Customers

Get better customer views

Unify transactional, demographic, and behavioural data with AI-powered identity management for a holistic view of customers.

The screenshot displays the Dynamics 365 Customer Insights interface for a customer named Abbie Bonam. The interface is divided into several sections:

- Customer Profile:** Shows personal details such as name (Abbie Bonam), location (Richmond, California, USA), last activity (9/26/2023 11:30PM), and contact information (phone, email, address).
- Activity Timeline:** A central section showing recent activities like website visits, email activity, and purchases, categorized by month (e.g., SEP 2023, Aug 2023).
- Key Metrics:** Summary cards for Churn Risk (0.97), Total Online Spend (1.1K), and Number of Online Purchases (10).
- Interest SoV:** A horizontal bar chart showing the share of voice for various products like Tea, Non-Alcohol, Coffee, Sports Drink, and Juice.
- Brand SoV:** A horizontal bar chart showing the share of voice for brands like Dunkin' Donuts, Caribou Coffee, Starbucks, and Peet's Coffee.

Enrich data and predict intent

Enrich profiles with diverse data sources, including proprietary intelligence, and unlock predictions with prebuilt AI models.

The screenshot displays the 'Customer Insights - Data' interface. The top navigation bar includes the title 'Customer Insights - Data', the user 'Contoso Coffee', and icons for help, settings, and a profile. A left sidebar contains navigation options: Home, Customers, Data (with a sub-menu for Data sources and Unify), Enrichment (highlighted), Activities, Tables, Exports, Insights, and Settings. The main content area is titled 'Enrichment (preview)' and includes a '+ Add enrichment' button. Below this, there are two tabs: 'Discover' (selected) and 'My enrichments'. The 'Discover' tab shows a grid of enrichment cards, each with a description, data source, and an 'Enrich my data' button. The cards are: 1. 'Account engagement' (Data from Microsoft Office 365) with 1 in use and 0 available. 2. 'Company data' (Provided by Dun&Bradstreet) with 0 in use and 10 available. 3. 'Company data' (Provided by Leadspace) with 0 in use and 10 available. 4. 'Enhanced addresses' (Data from Microsoft) with 1 in use and 9 available. 5. 'Enhanced company data' (Data from Microsoft) with 0 in use and 10 available. 6. 'Location' (Data from Microsoft Azure Maps) with 0 in use and 10 available. 7. 'Location' (Provided by HERE Technologies) with 0 in use and 10 available. 8. 'Secure File Transfer Protocol (SFTP) custom ...' (Provided by Microsoft) with 0 in use and 10 available.

Create customer segments

Build new segments or discover new audiences with AI recommendations that are continually updated with real-time data.

The screenshot displays the 'Customer Insights - Data' interface. The left sidebar contains navigation options: Home, Customers, Segments (selected), Measures, Intelligence, Predictions, Custom models, Data, Data sources, Entities, Unify, Enrichment, Activities, Relationships, Exports, and Admin. The main content area is titled 'Segments' and shows 'Suggestions (preview)'. A notification at the top states: 'You're viewing sample data. Customize what you see by connecting to your own data. For licensing options, contact sales.' Below this, there are buttons for 'Find new suggestions', 'Edit suggestions', and 'Refresh suggestions'. The segment suggestions are sorted by 'Percentage: High to Low' and generated on 9/30/20. Six suggestions are shown in a grid:

Segment Suggestion	Members	Attributes
LifetimeValue is 64% above average	1.2M members	• Occupation is Accountant • YearlyIncome is greater than \$150,000 • N_years_customer is greater than 10
LifetimeValue is 58% above average	3.4M members	• Occupation is Accountant • YearlyIncome is greater than \$130,000 • 2 other influencing attributes
LifetimeValue is 52% above average	5.4M members	• Occupation is lawyer • YearlyIncome is greater than \$130,000 • 1 other influencing attributes
LifetimeValue is 38% above average	8.7M members	• Occupation is Accountant • N_years_customer is greater than 3 • 1 other influencing attributes
LifetimeValue is 32% above average	9.2M members	• YearlyIncome is greater than \$100,000 • N_years_customer is greater than 2 • 2 other influencing attributes
LifetimeValue is 28% above average	12.7M members	• Occupation is doctor • NumberCarsOwned greater than 2 • 2 other influencing attributes

Respect consent and privacy

Add consent data during the unification process using automatic data refresh to ensure that your organization meets privacy and security regulations.

The screenshot displays the Microsoft Dynamics 365 Customer Insights - Data interface. The top navigation bar includes 'Customer Insights - Data', 'Environment', and utility icons. A left-hand navigation pane lists 'Home', 'Accounts', 'Segments', 'Measures', 'Insights', and 'Data'. The main content area is divided into three sections:

- Contact Profile:** Shows the 'Contoso' account with a green 'CO' logo. Details include: CustomerId (d169b93a-3d5b-e35a-0ec3-cf446cd), Telephone (1 (425) 555-7700), Email (info@contoso.com), and Address (1138 23 Ave S, Seattle, Washington, USA). Below this, a 'Contacts' section lists two individuals: Patti Melendez (Primary email: pattim@contoso.com, Primary phone: 1 (425) 555-7700, Date of birth: 3/21/1980, Gender: Female) and Charlie Owens (Primary email: cowens@contosocom, Primary phone: 1 (425) 538-0783, Date of birth: 09/8/1970).
- Activity Timeline:** Titled 'Activity Timeline' with a 'Filter' icon. It shows a summary of activities: 1 Ticket, 1 TransactionHe..., and 1 Ticket. Below this, a list of activities for 2019 (3) is shown, sorted by date. Activities include: Web - 6/13/2019, 4:52 PM (UTC) Website visit; Call - 6/13/2019, 5:01 PM (UTC) Customer service call; Event - 7/10/2019, 2:30 PM (UTC) Marketing event; Web - 7/10/2019, 4:10 PM (UTC) Website visit; Call - 7/14/2019, 10:52 AM (UTC) Customer service call; Event - 8/19/2019, 1:30 PM (UTC) Marketing event; Web - 8/19/2019, 10:52 AM (UTC) Website visit; Call - 8/19/2019, 11:03 AM (UTC) Customer service call.
- Office 365 engagement:** A summary card for the 'Last 30 days' (last updated 3 hours ago). It displays: 321 emails Outbound, 211 emails Inbound, and 12 Number of meetings.



Boost your productivity

Get insights faster

Discover insights and quickly understand customer attributes with individual profile summaries using Copilot.

The screenshot displays the Microsoft Dynamics 365 Customer Insights interface. The top navigation bar includes 'Customer Insights - Data', 'Environment', and utility icons. A left sidebar contains navigation options: Home, Accounts (selected), Segments, Measures, Insights, and Data. The main content area is divided into three columns:

- Customer Profile (Contoso):** Features a profile card with a 'CO' logo, location 'Seattle, WA, USA', and contact icons. Below this is a list of attributes: CustomerId (d169b93a-3d5b-e35a-0ec3-cf446cd), Telephone (1 (425) 555-7700), Email (info@contoso.com), and Address (1138 23 Ave S, Seattle, Washington, USA). A 'Contacts' section lists two individuals: Patti Melendez (Primary email: pattim@contoso.com, Primary phone: 1 (425) 555-7700, Date of birth: 3/21/1980, Gender: Female) and Charlie Owens (Primary email: cowens@contosocom, Primary phone: 1 (425) 538-0783, Date of birth: 09/8/1970).
- Activity Timeline:** Titled 'Activity Timeline' with a 'Filter' icon and a 'Change to contact view' link. It shows a summary of activity: 1 Ticket, 1 TransactionHe..., and 1 Ticket. A list of activities for 2019 (3) is shown, sorted by date: Web (6/13/2019, 4:52 PM UTC) Website visit; Call (6/13/2019, 5:01 PM UTC) Customer service call; Event (7/10/2019, 2:30 PM UTC) Marketing event; Web (7/10/2019, 4:10 PM UTC) Website visit; Call (7/14/2019, 10:52 AM UTC) Customer service call; Event (8/19/2019, 1:30 PM UTC) Marketing event; Web (8/19/2019, 10:52 AM UTC) Website visit; Call (8/19/2019, 11:03 AM UTC) Customer service call.
- Office 365 engagement:** A summary box for the 'Last 30 days' (last updated 3 hours ago) showing 321 emails Outbound, 211 emails Inbound, and 12 Number of meetings.

Connected customer experiences across teams



Marketing

Tailor real-time customer journeys and use Copilot to find new insights, create audience segments, and produce personalized content.



Sales

Empower sellers with real-time leads, enabling personalized interactions through AI-generated predictions and product recommendations.



Service

Identify customer issues proactively and provide agents with in-depth customer profiles that help route cases and resolve issues faster.



IT'S DEMO TIME!



Real customer, real results

Real customer, real results

**CAMPARI
GROUP**

"We're accelerating the visibility of consumer insights and business intelligence."

Chad Niemuth, Vice President Global IT, Campari Group

Products




 [Dynamics 365 Customer Insights](#)  [Power Platform](#)

LYNK & CO

"I see that with Customer Insights and the use of Copilot we can achieve great success and results by improving the brand."

Madalena Albuquerque, Product Owner, Lync & Co

Products

 [Dynamics 365 Customer Insights](#)  [Dynamics 365 Sales](#)
 [Dynamics 365 Customer Service](#)

**N
NATUZZI**

"Working with Microsoft Dynamics 365 enables us to deliver a well-crafted experience and empower our entire global team."

Antonio Achille, CEO, Natuzzi

Products

 [Dynamics 365 Customer Insights](#)  [Dynamics 365 Sales](#)

Real customer, real results



“Once you bring different types of data into the mix, you can understand more about people.”

Franco Segarra, Head of Innovation, Valencia CF

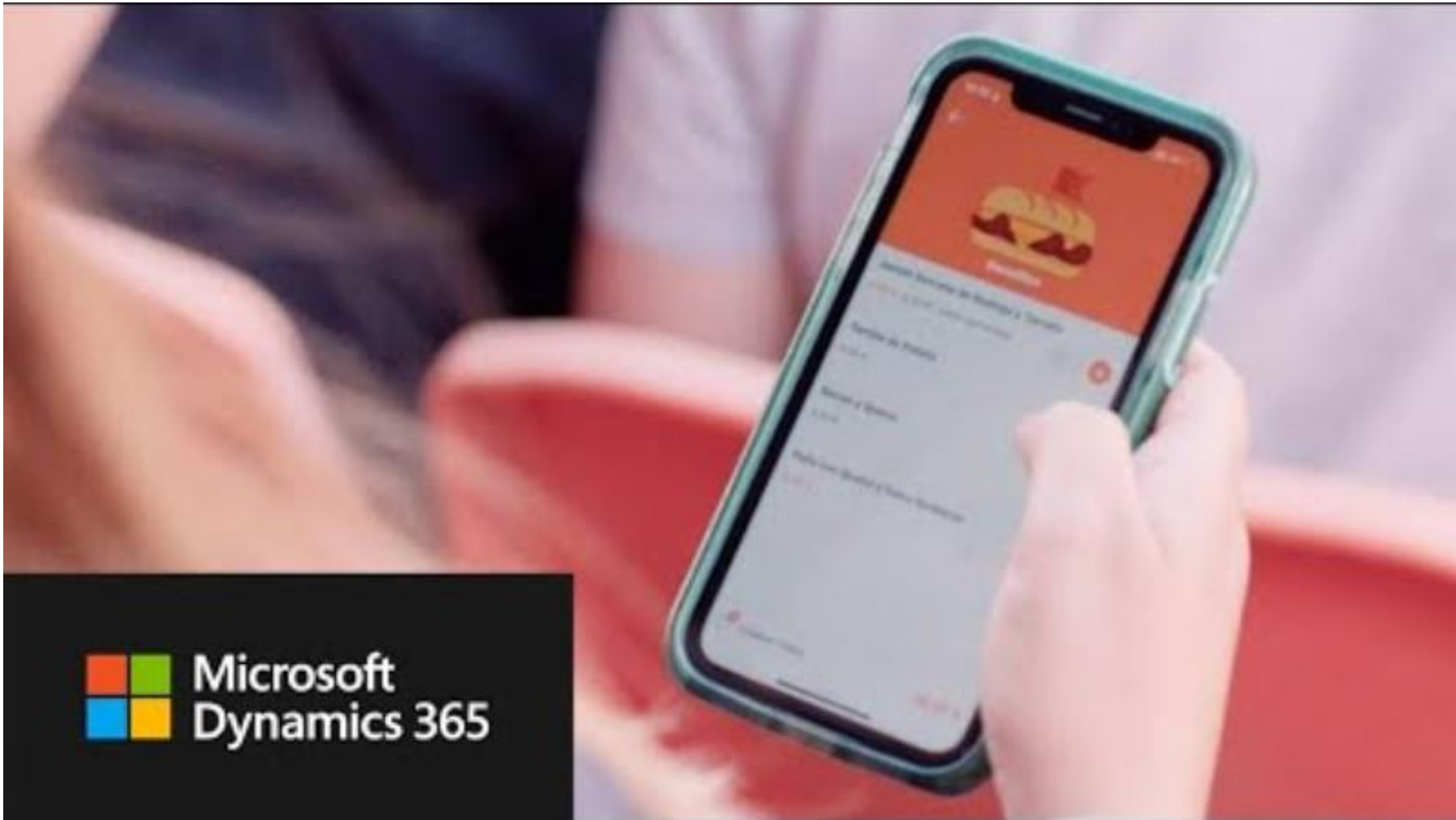
Products

 [Dynamics 365 Customer Insights](#)

“Personalized content with the right tone is critical to delivering fan engagement – we are excited about how Copilot will help enable high impact content creation faster than ever before.”

—Franco Segarra: Head of Innovation
Valencia CF

Valencia's story



What are the advantages?

By implementing Microsoft Dynamics 365 Customer Insights, businesses can:

- Gain a comprehensive understanding of your customers' preferences, behaviours, and needs.
- Improve marketing campaign effectiveness through personalised messaging and targeted segmentation.
- Enhance customer experiences across all touchpoints by delivering relevant and timely interactions.
- Increase your customer retention and loyalty by anticipating their needs and addressing pain points proactively.
- Drive revenue growth by optimising sales and marketing strategies based on predictive insights.
- Knowing more about your customers gives you the competitive edge.

Questions & Answers



Call to Action

Following the demo, we encourage you to:

- Reflect on the insights gained during the presentation and how they align with your organization's goals and challenges.
- Schedule a follow-up meeting or consultation with our team to delve deeper into your specific use cases and requirements.
- Explore the online resources and case studies available to see real-world examples of how businesses have successfully implemented Microsoft Dynamics 365 Customer Insights.
- Begin planning your strategy for leveraging customer data to drive growth and improve customer experiences.



Thank you.

CRM
connect

THURSDAY 25 APRIL 2024

