

# businessbase

CUSTOMER ENGAGEMENT ENGINEERS

22-1-2020

**Dynamics 365 Customer Insights**

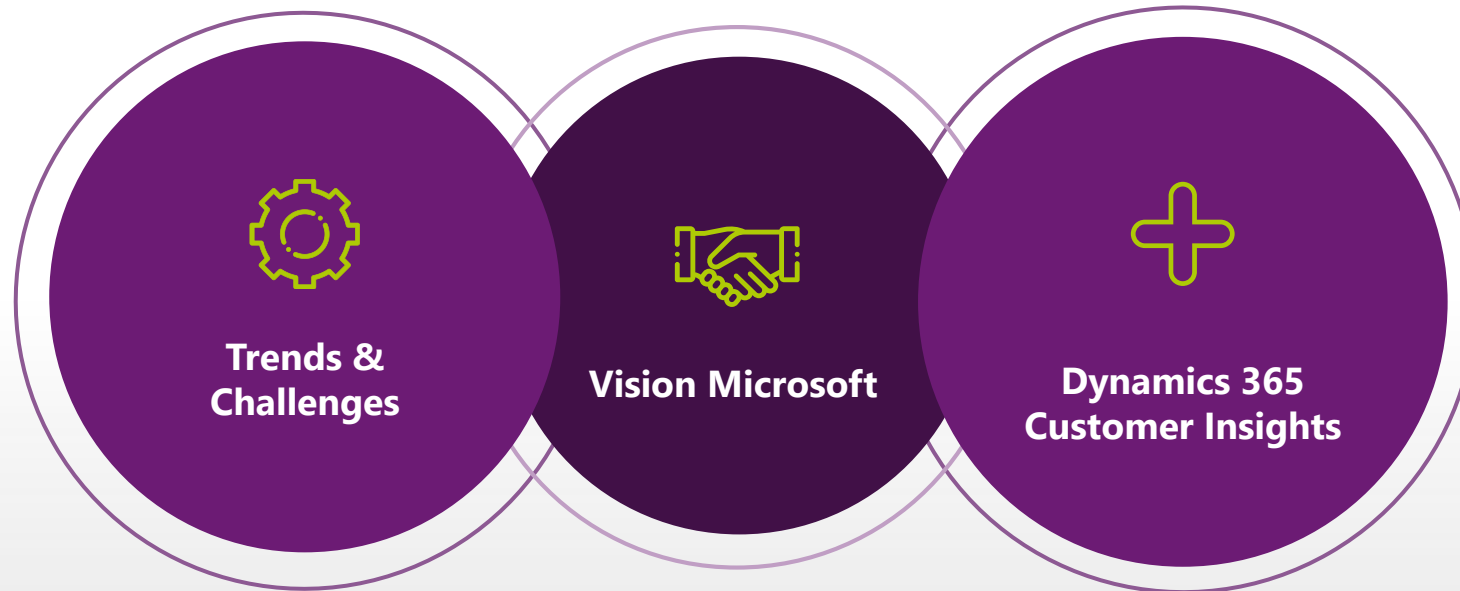


**Wendy Bakker**  
Technical Specialist  
Microsoft



**Timo Bax**  
Chief Technical Officer  
BusinessBase

# Doel van deze presentatie





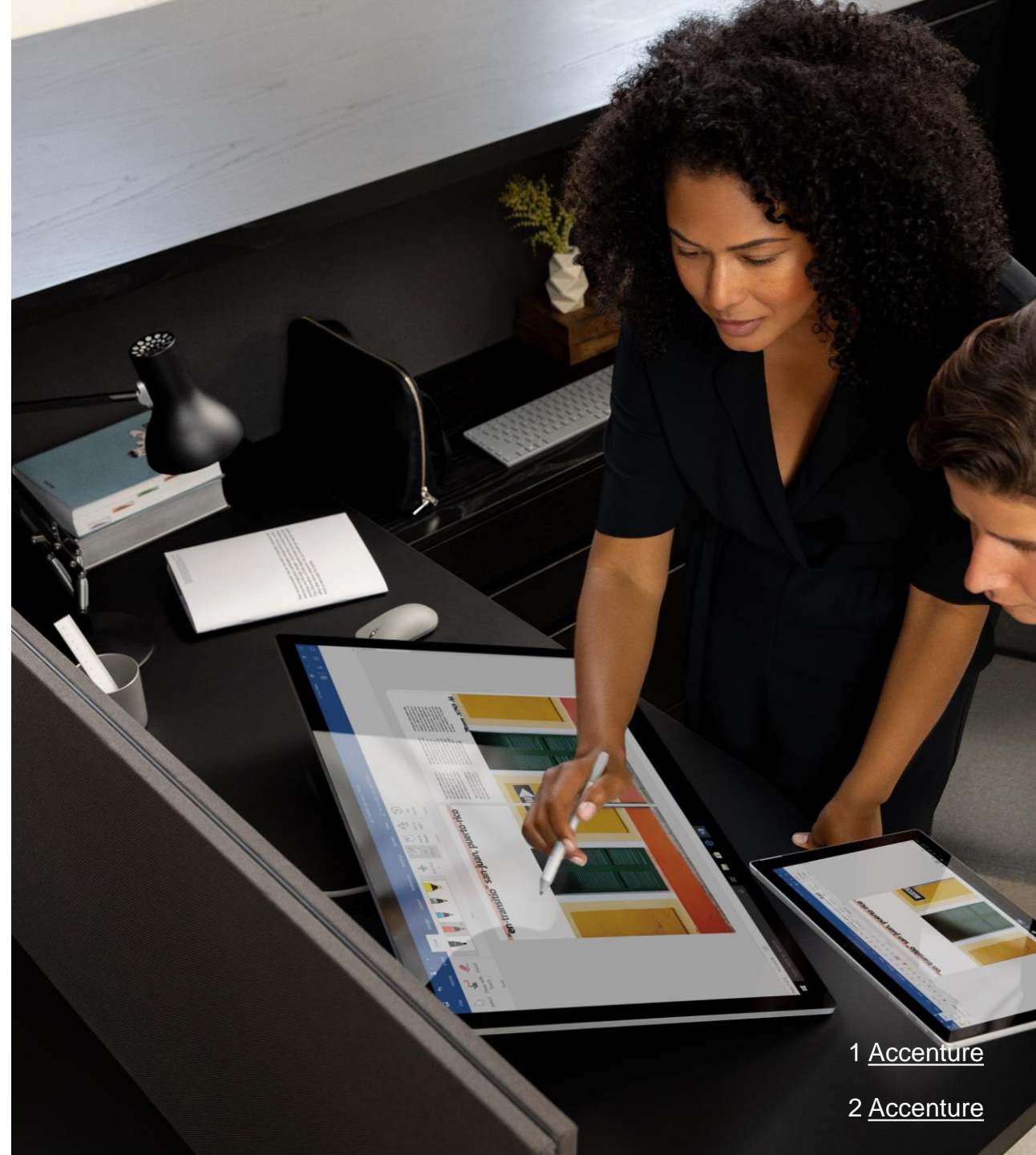
# Customer expectations are growing

91%

of consumers are more likely to shop with brands who recognize, remember, and provide relevant offers and recommendations. <sup>1</sup>

81%

of buyers want brands to get to know them and understand when to approach them and when not to. <sup>2</sup>



1 [Accenture](#)

2 [Accenture](#)

# Today's experiences are falling short

65%

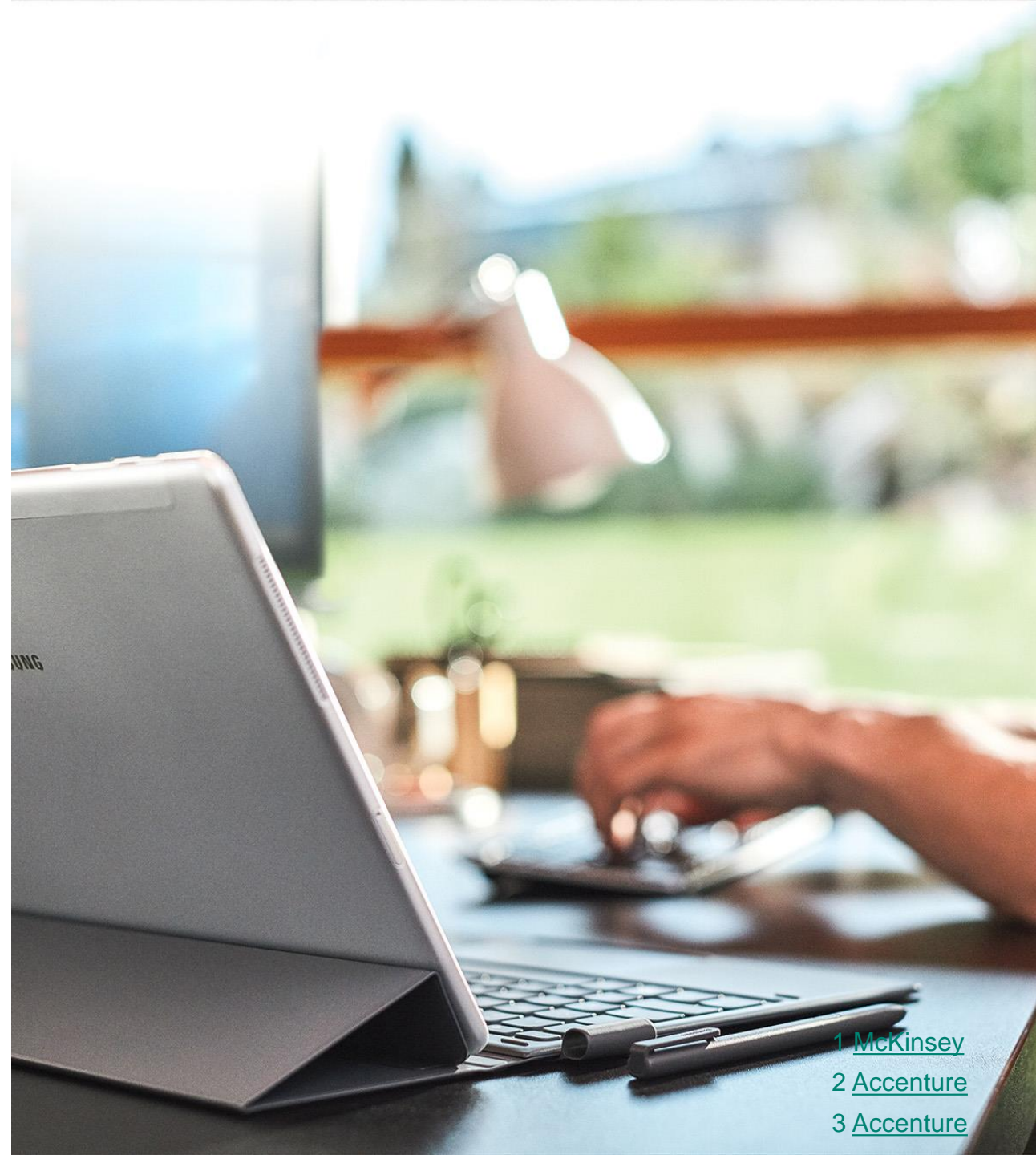
of customers are frustrated by inconsistent experiences across channels. <sup>1</sup>

74%

of customers are frustrated by the irrelevant content they are exposed to on websites. Up to 40% of them will leave. <sup>2</sup>

61%

of customers stopped doing business with at least one company last year because of poor customer experience. <sup>3</sup>



<sup>1</sup> [McKinsey](#)

<sup>2</sup> [Accenture](#)

<sup>3</sup> [Accenture](#)



# Key challenges

Customer data and systems are fragmented

Multiple “criteria for –” and “approaches to –” personalization

Data privacy laws and protection of customer data are critical

Lack scalable solutions for large volumes of customer data



1970



1990



2010



# Reactive



Production line down



Service center operator logs issue



Emergency service visit



Customer disruption resolved



MOISTURE



±3%RH

NITROGEN  
19ppm

Recommendation:  
25ppm



TEMPER







Heart rate at steady rhythm. No immediate concerns. Patient health at premium level for surgical procedure.

BP stable

Step 3 of 7: 4 hours remaining  
Primary incision made

Monitoring system secure and downloaded to main server. Video playback enabled. To be shared with residence in the left wing only.





EXIT

\$39

TAKE AN ADDITIONAL 20% OFF YOUR PURCHASE

RECEIVE 20% OFF WITH PURCHASE

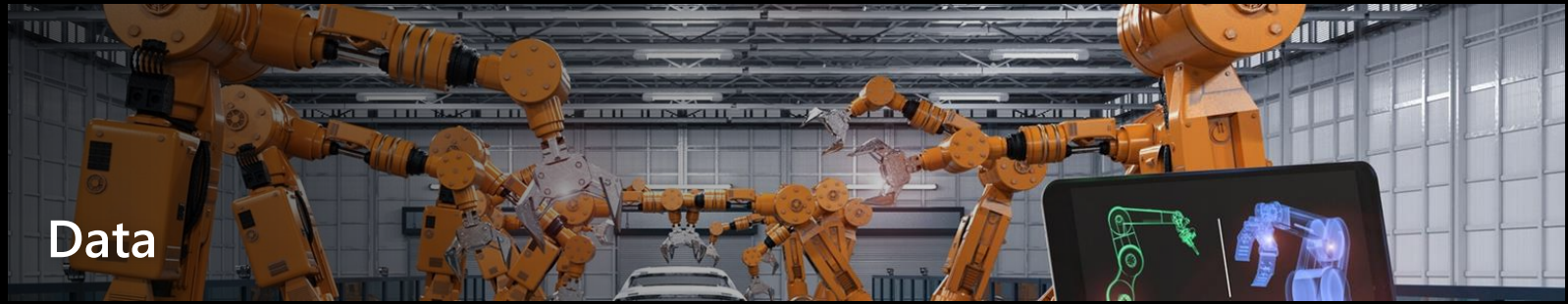
Customer data recorded and applied

TAKE AN ADDITIONAL 20% OFF YOUR PURCHASE

\$199

Smart device applies all sales available to items collected





Data



Anomaly detection model

Proactive



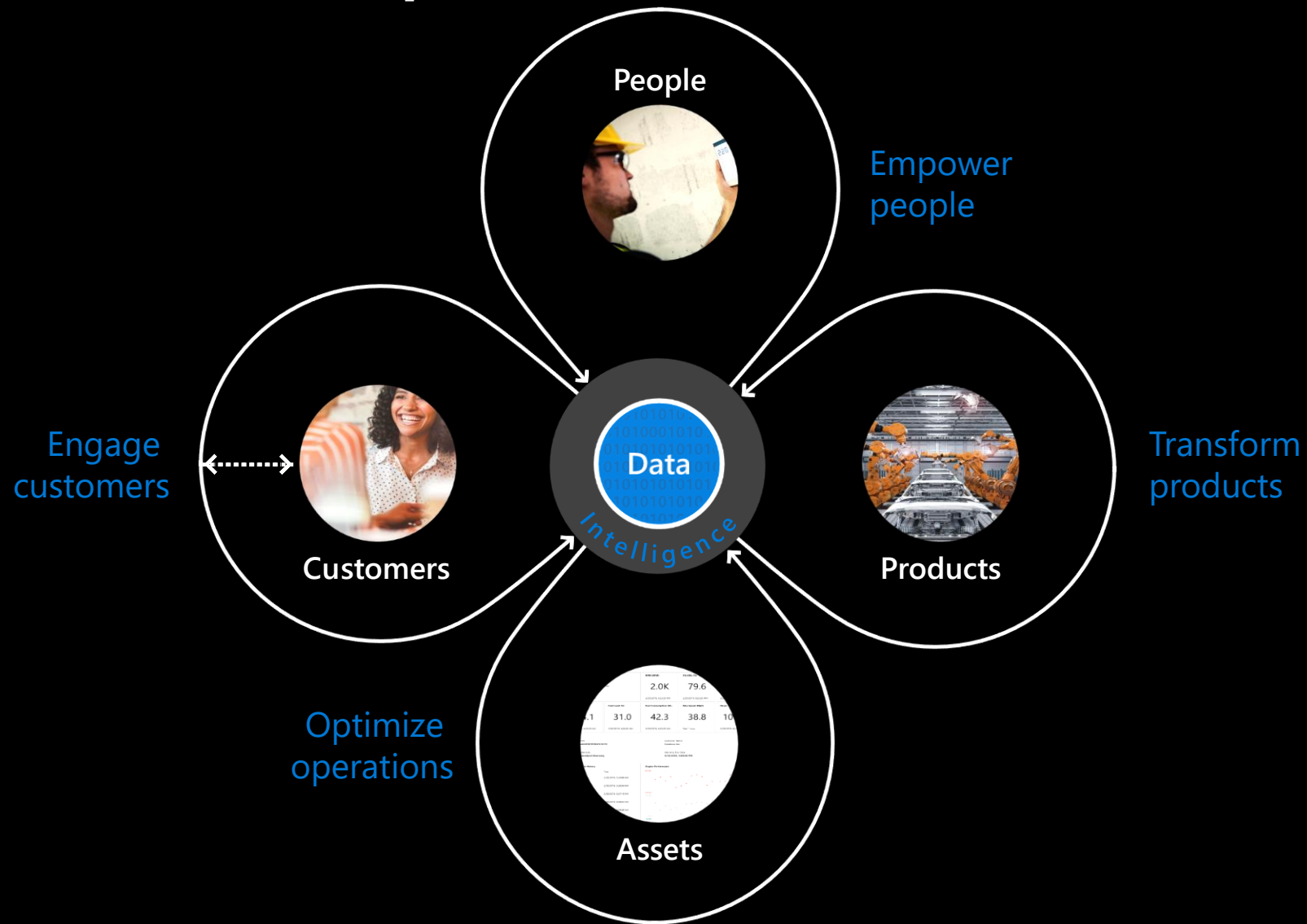
Proactive maintenance visit



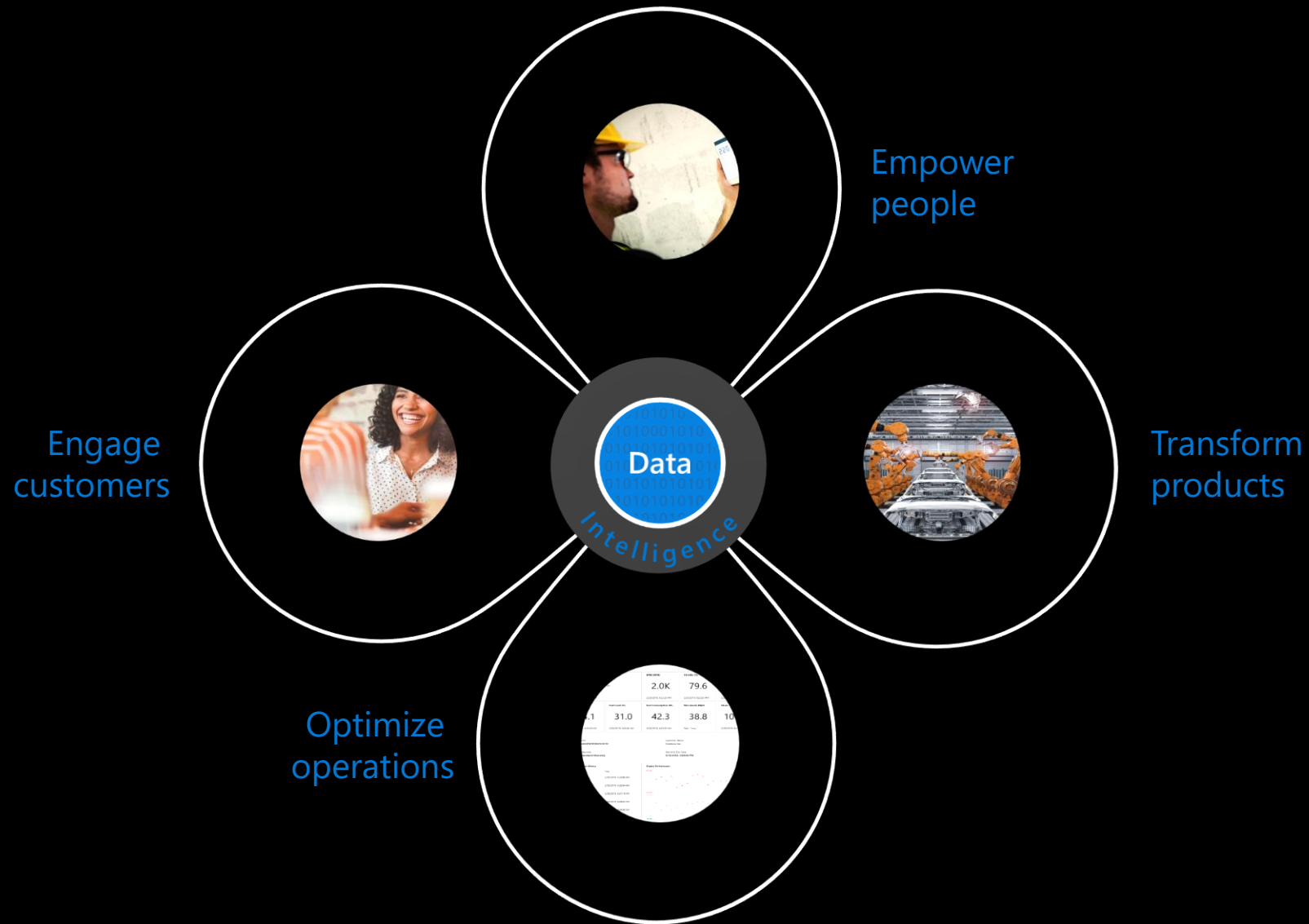
Customer never disrupted



# Digital feedback loop

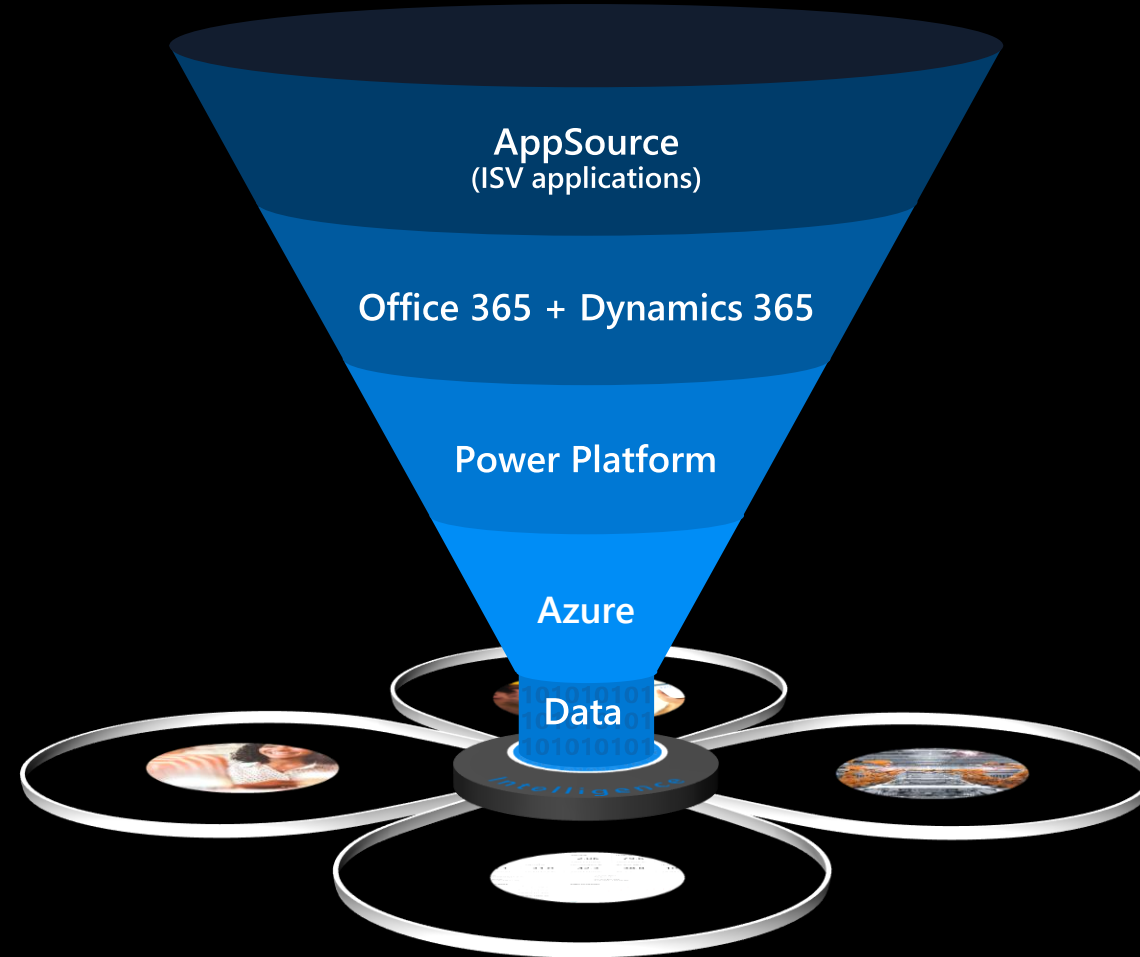


# Digital feedback loop



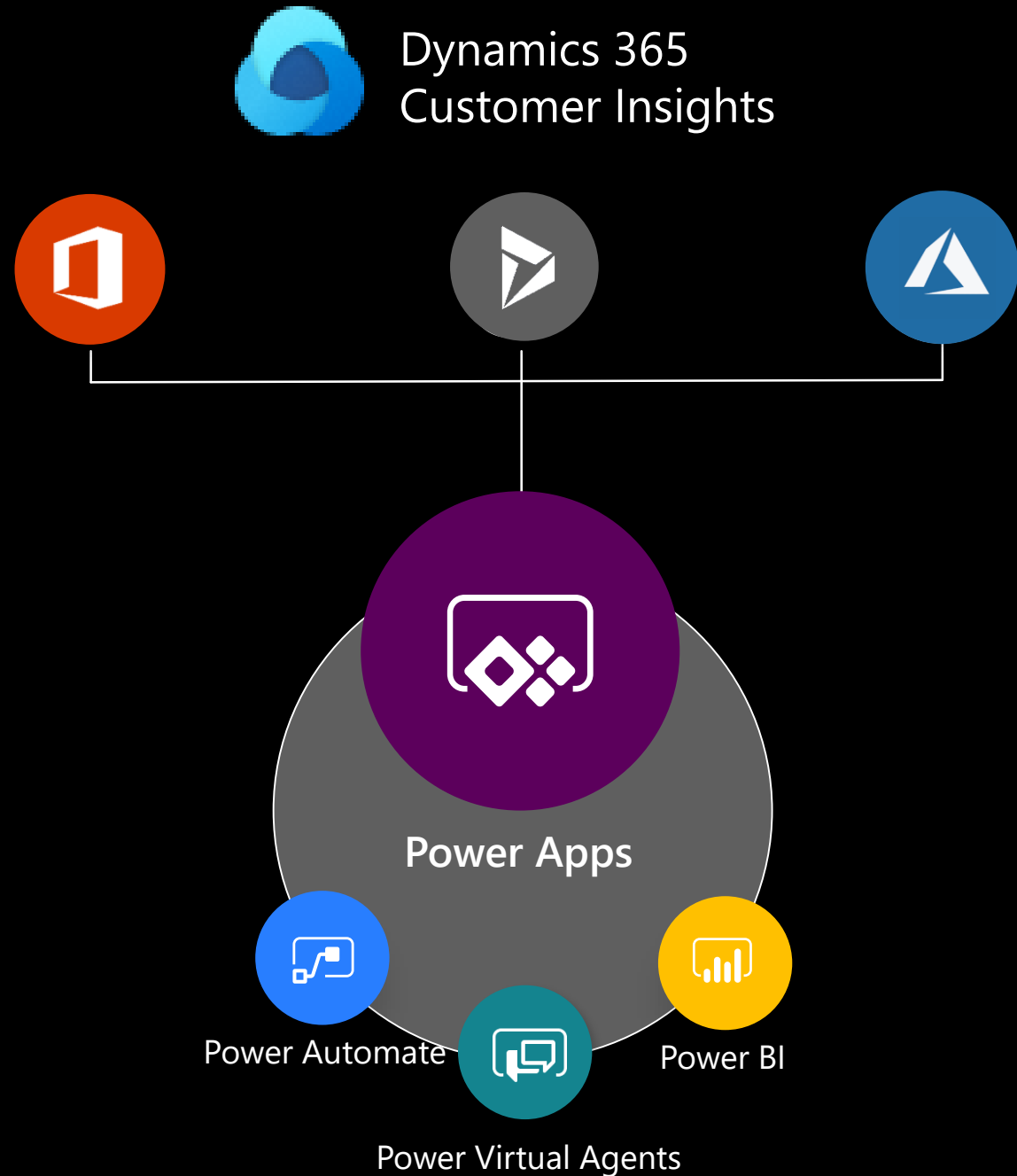


# Digital feedback loop



# The Microsoft Power Platform

One high productivity platform that spans Office 365, Dynamics 365, and standalone applications



**Get more value from your data  
with D365 Customer Insights**



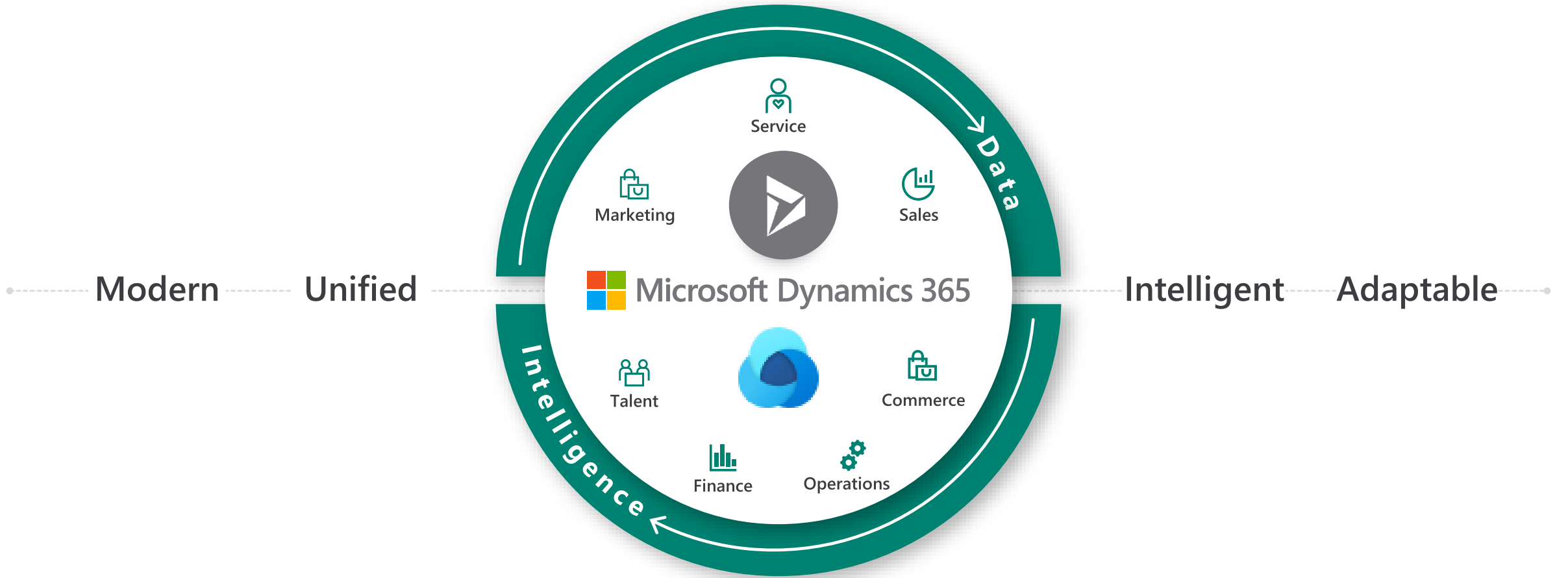


# Customer Data Platform

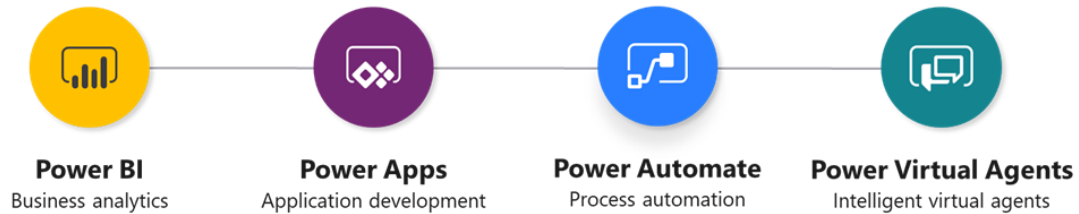
## Wat zijn de kenmerken?

- Centraal en uniek klantprofiel vanuit gecombineerde bronnen
- Geen anonieme data
- Packaged Software
- Toegankelijk voor gebruik in andere systemen



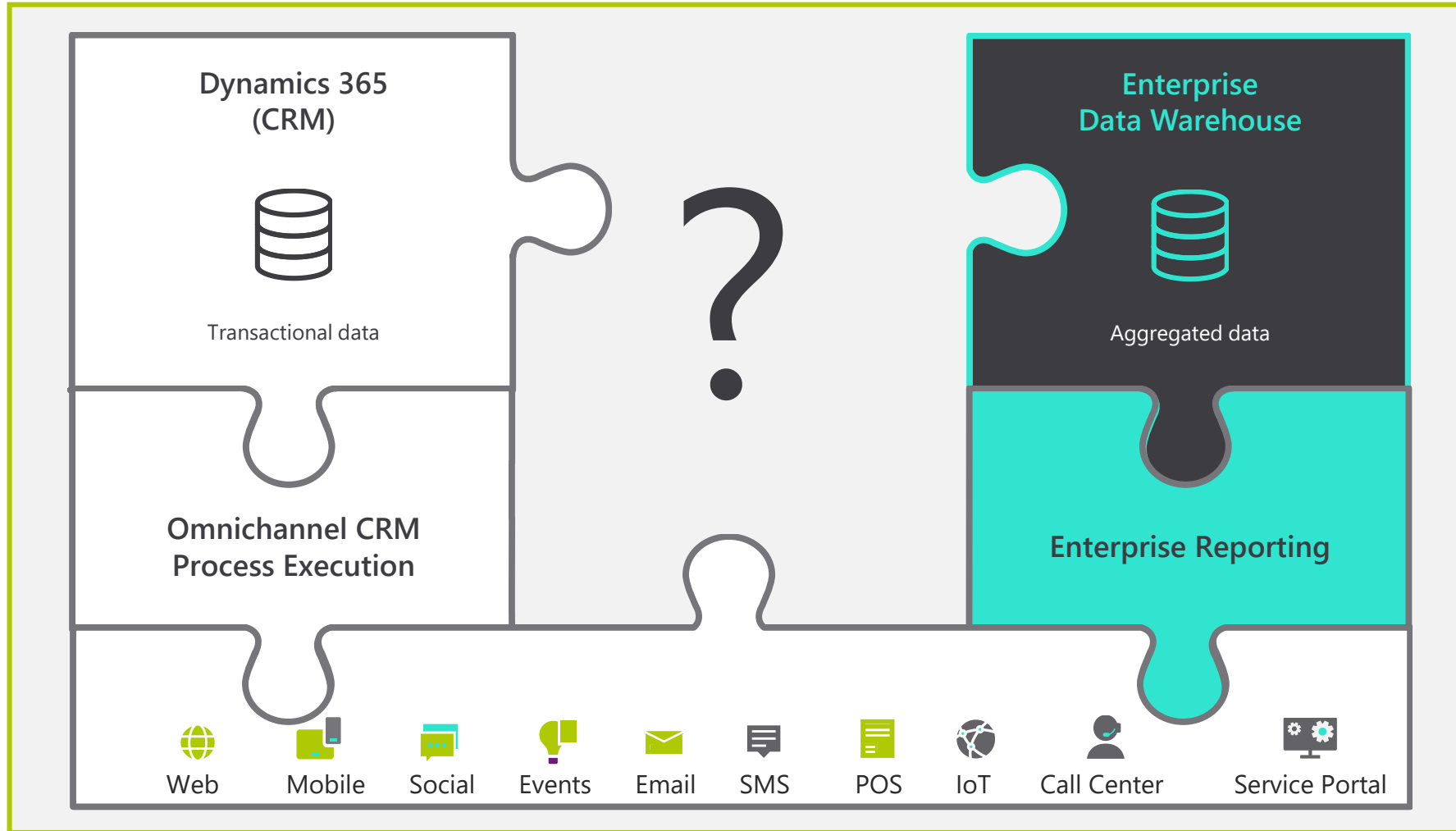


### Power platform

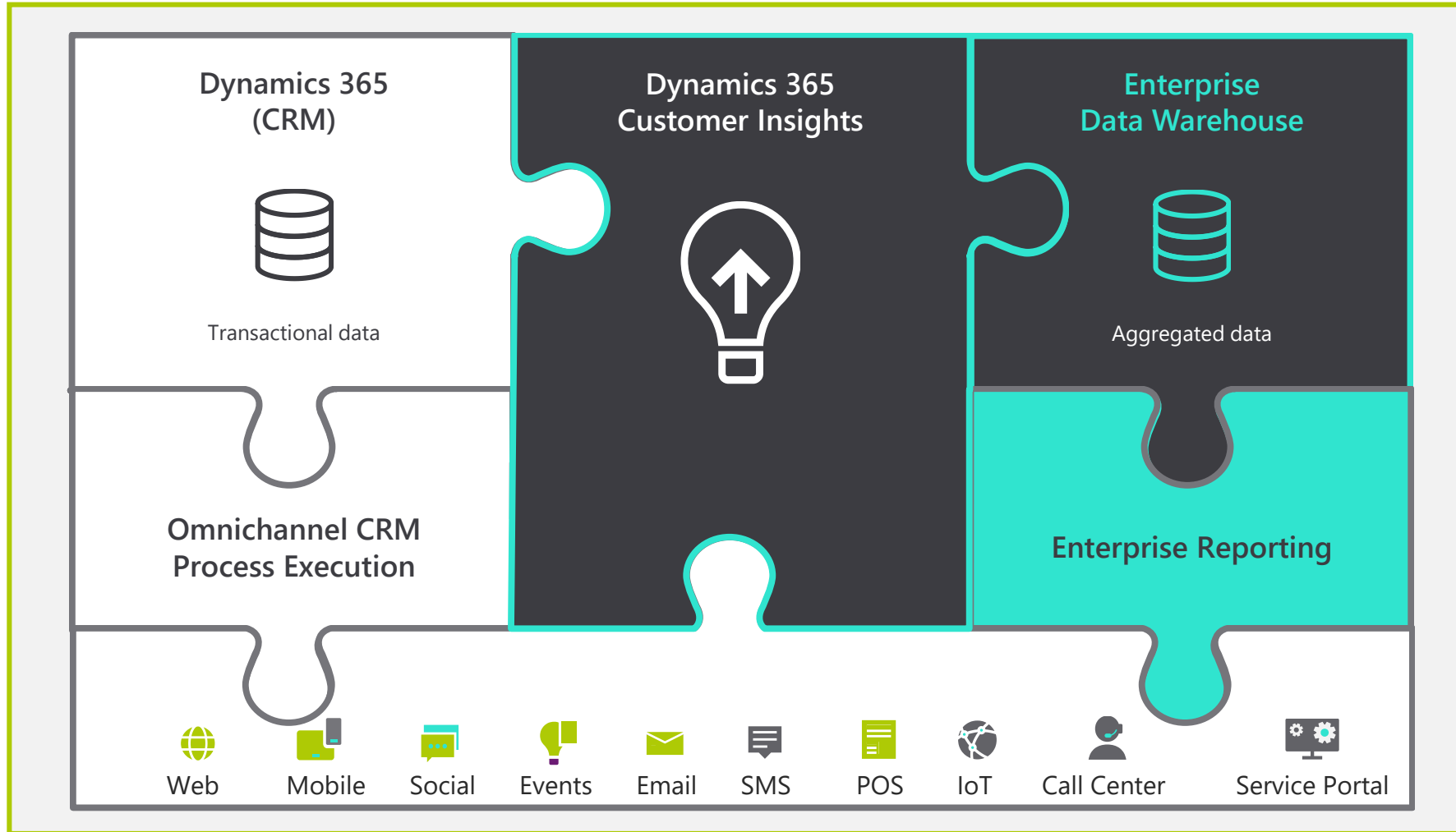




# The current customer-engagement analytics landscape



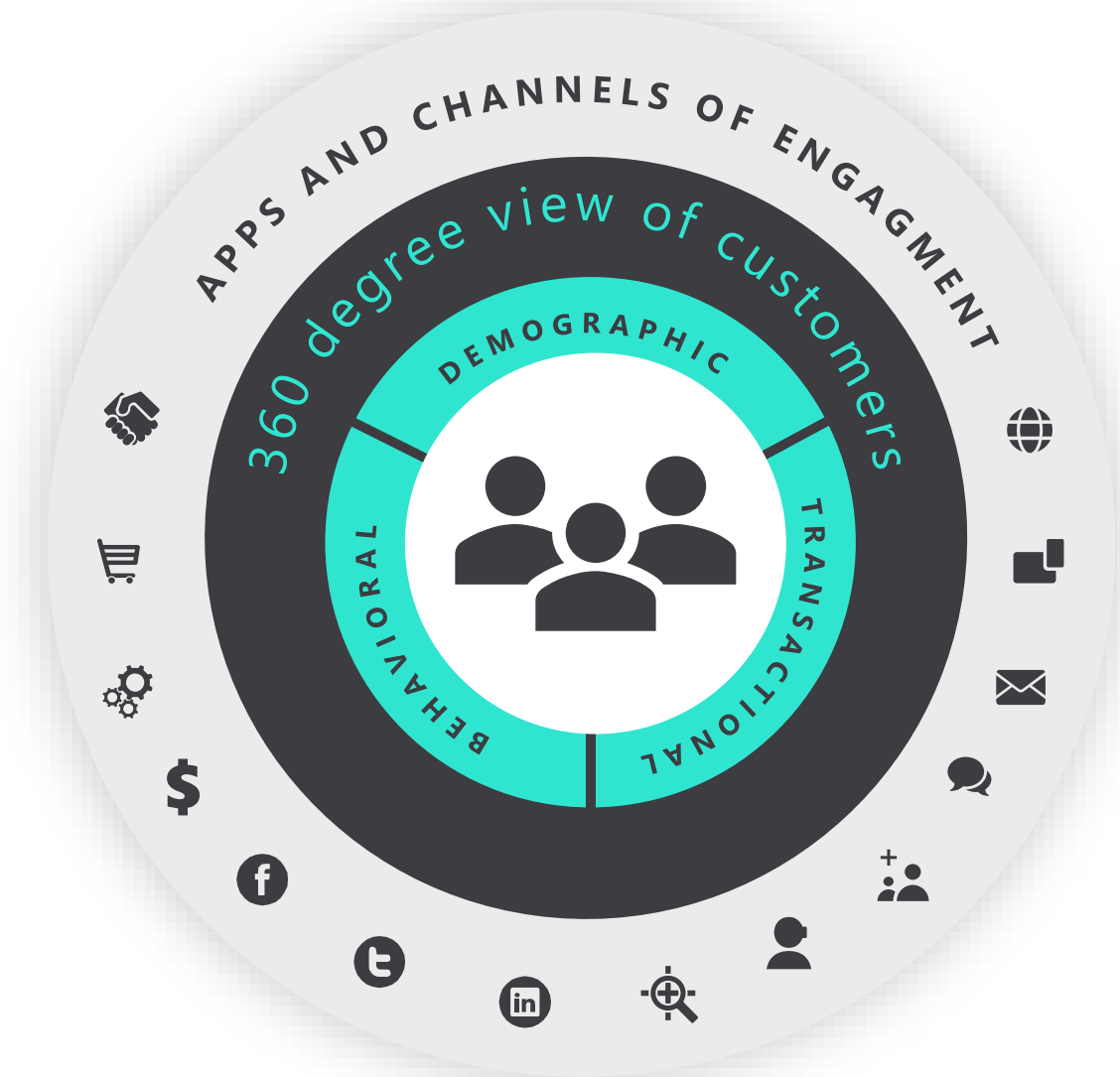
# Evolving the customer-engagement analytics landscape





# Dynamics 365 Customer Insights

Empower every organization to **unify** and **understand** its **customer data** to derive insights that **power personalized experiences** and processes



# Why Customer Insights



Get a holistic view of customers



Unlock insights and take action



Adapt and extend



Rely on a productive and trusted platform



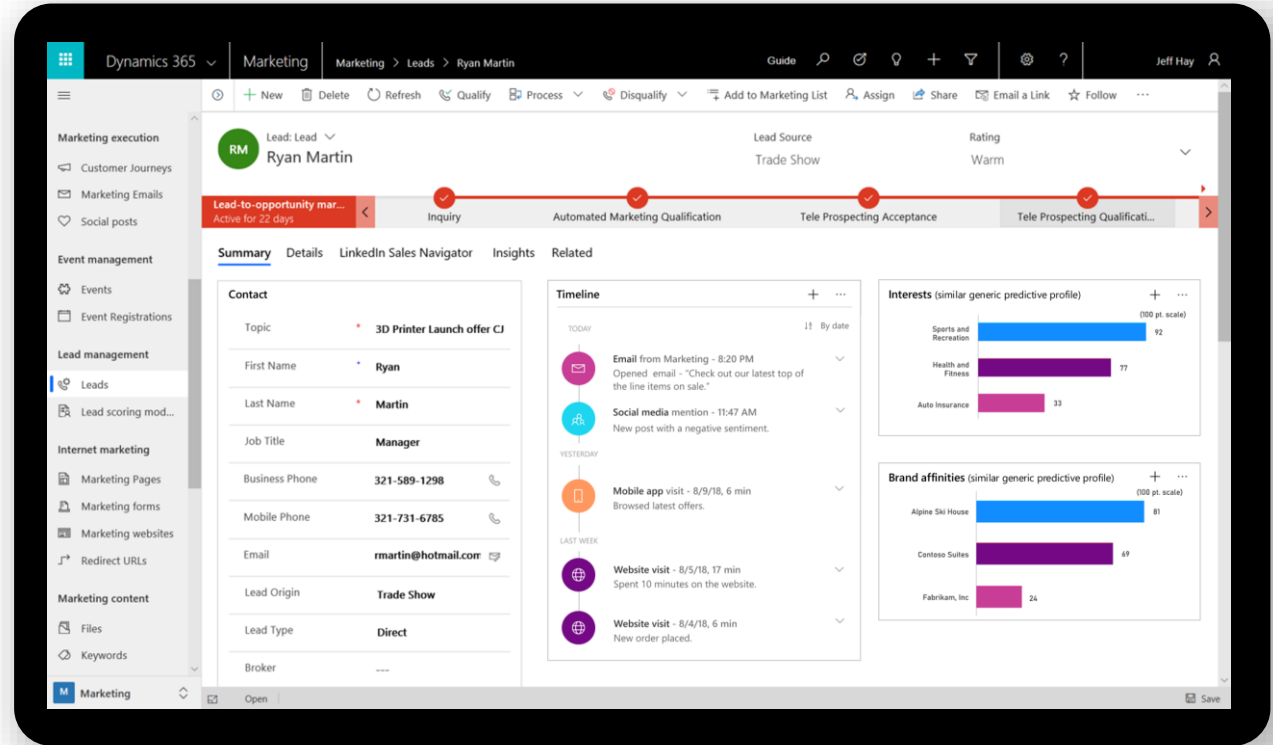


# Power end-to-end customer experiences



# Use case powered by Customer Insights

- Marketing: Personalize offers and website experiences based on historical customer data from multiple systems and micro-targeted segments to increase conversion rates
- Sales: Foster relationships with a complete view of a customer's interactions to better understand the health of the relationship
- Service: Implement self-service tools and chatbots that allow customers to resolve issues themselves





# Key Phases



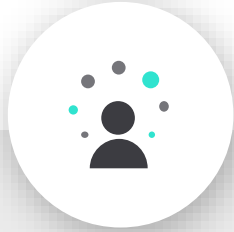
## Ingestion

Bring customer and activity data from all sources



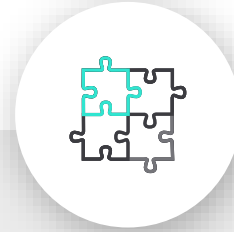
## Mapping and matching

Identify and understand profile data from transactional and observational sources



## Conflation

Consolidate data into a single customer profile with source lineage



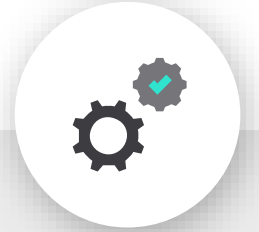
## Enrichment

Enrich profiles using AI models and proprietary signals from Microsoft Graph



## Insights

Derive insights that automate and optimize processes



## Action

Leverage insights across all channels of engagement with connectors and APIs

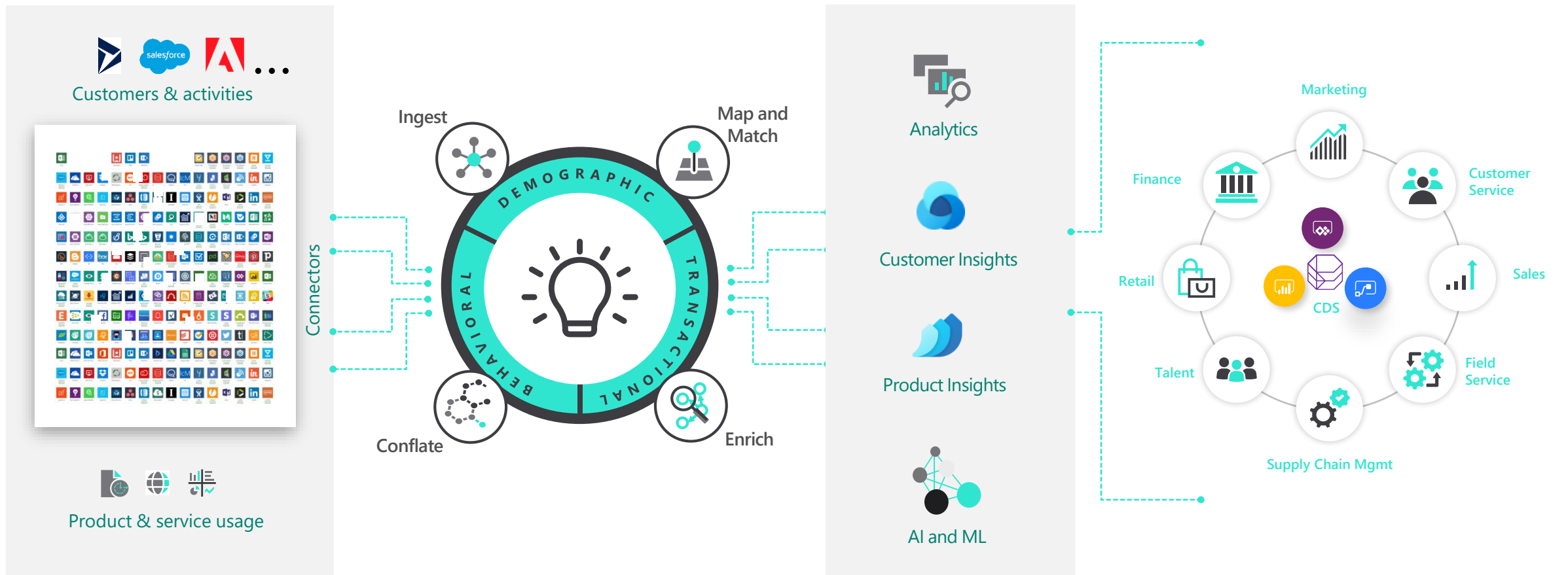
..... Data .....

..... Unification .....

..... Insights .....

..... Action .....

# Our Approach



Data

Unification

Insights

Action

- Home
- Customers
- Segments
- Measures
- Intelligence
- Data
- Data sources
- Entities
- Unify
- Enrichment
- Activities
- Relationships
- Admin

Run Save Discard changes

<input type="checkbox"/> City	eCommerceContacts	eCommerce	↻ ×
<input type="checkbox"/> State	eCommerceContacts	eCommerce	↻ ×
<input type="checkbox"/> Country	eCommerceContacts	eCommerce	↻ ×
<input type="checkbox"/> ContactIdLOYALTY	loyCustomers	LoyaltyScheme	↻ ×
<input type="checkbox"/> entityimage_url	DynamicsContacts	Dynamics365CustomerServ	↻ ×
> FirstName (3)			⋮
> LastName (3)			⋮
^ FullName (3)			⋮
Rank Name	Entity	Source	
1 FullName	eCommerceContacts	eCommerce	⋮
2 FullName	loyCustomers	LoyaltyScheme	⋮
3 fullname	DynamicsContacts	Dynamics365CustomerServ	⋮
> DateOfBirth (2)			⋮
> Gender (3)			⋮
^ EMail (3)			⋮
Rank Name	Entity	Source	
1 EMail	eCommerceContacts	eCommerce	⋮
2 EMail	loyCustomers	LoyaltyScheme	⋮
3 emailaddress1	DynamicsContacts	Dynamics365CustomerServ	⋮
> Telephone (3)			⋮

### Keys

Name	Entity	Source
------	--------	--------



Customer Insights

Environment  
Coritoso Coffee (CRM3...)

Run Save Discard changes

### Enrichment (preview)

Add insights to your customer data based on the brands and categories you choose. Available only in the US.

Enriched customers: **483**

**Customer fields**  
Select at least 2 fields from the Customer entity. These fields will be used to show insights from similar people.

Date of birth:

Gender:

ZIP code:

**Brands and categories**  
Data for brands and categories is provided by Microsoft Graph.

Choose on my own  Industry's top brands and categories

Brands:  4/5  
Examples: Microsoft, GitHub, LinkedIn

Interests:  2/5  
Examples: Education, Home Decor, Telecom

Customer Insights

Environment  
Coritoso Coffee (CRM3...)

Home Customers Segments Measures Intelligence Data Data sources Entities Unify Enrichment Activities Relationships Admin

← Back to Customers

## Marva Mejia

CustomerID: 9057969ced1d00c244bde18cb18a88...

FirstName: Maria  
LastName: Mejia  
FullName: Marva Mejia  
DateOfBirth: 02/03/1984, 01:00  
Gender: Female  
EMail: maria\_meja@beanlic.com  
Telephone: 1549373060  
PostCode: --  
StreetAddress: --  
City: --

**Timeline**  
Activities groups (1)  
4 posPurchases

Older - 4 Items

- POS Purchase - 27/07/2018, 02:00  
Purchased a product In-Store
- POS Purchase - 28/10/2017, 02:00  
Purchased a product In-Store
- POS Purchase - 17/09/2017, 02:00  
Purchased a product In-Store
- POS Purchase - 28/03/2017, 02:00  
Purchased a product In-Store

**Interests (similar generic predictive profile)**  
Food  
Coffee & Espresso Makers  
Provided by Microsoft Graph

**Brand affinities (similar generic predictive profile)**

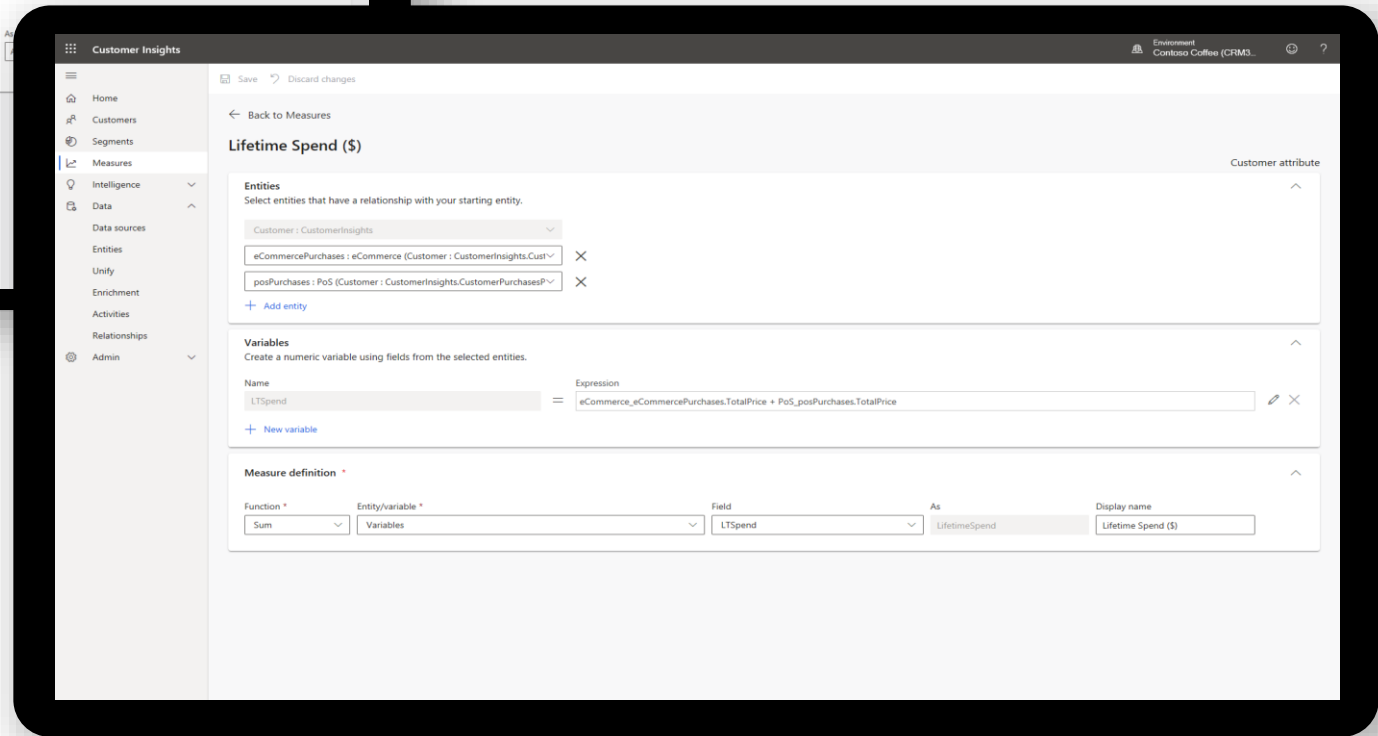
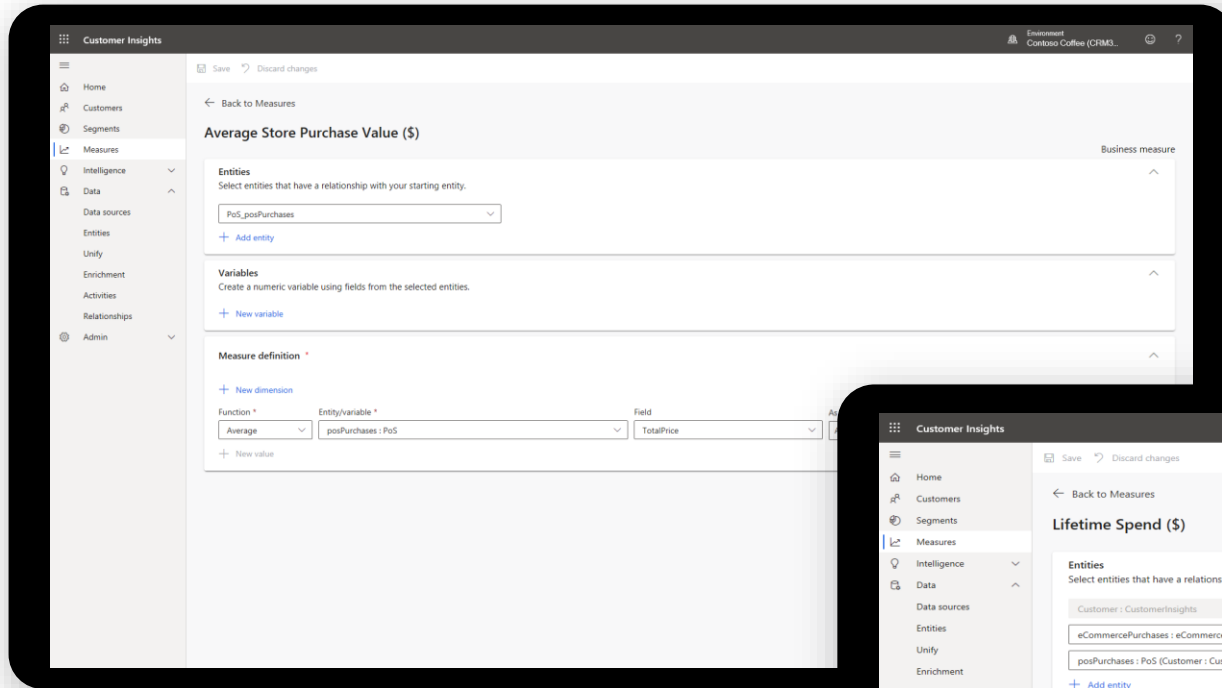
- philips
- nespresso
- philips
- nestle
- coffee mate

Provided by Microsoft Graph


Average Web Purchase (\$) --  
18/12/2019, 21:31

Average Store Purchase (\$) **76**  
18/12/2019, 21:31



Total Club Points  
Lifetime Spend (\$)



- Home
- Customers
- Segments
- Measures
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- Admin



## Zand Elizabeth

CustomerId	46f22156530e10018701c6baea3a1431
FirstName	Elizabeth
LastName	Zand
FullName	Zand Elizabeth
DateOfBirth	24/09/2001, 02:00
Gender	Female
EMail	elizabeth_zand@duncanhanson.com
Telephone	+1-543-417-9499x398
PostCode	19378
StreetAddress	1161 Jason Passage Apt. 794
City	Cedar Rapids

### Activities groups (3)

- 4 posPurchases
- 1 webReviews
- 2 eCommercePur...

---

Older - 7 Items

- POS Purchase - 29/01/2019, 01:00  
Purchased a product In-Store
- POS Purchase - 29/01/2019, 01:00  
Purchased a product In-Store
- WebsiteReview - 20/01/2019, 01:00  
Product is available only in limited colors
- POS Purchase - 29/12/2018, 01:00  
Purchased a product In-Store
- POS Purchase - 23/10/2018, 02:00  
Purchased a product In-Store
- OnlinePurchase - 06/11/2017, 01:00  
Purchased a product online
- OnlinePurchase - 09/01/2017, 01:00  
Purchased a product online

No data available

Provided by Microsoft Graph

### Brand affinities (similar generic predictive profile)

No data available

Provided by Microsoft Graph

### Average Web Purchase (\$)

200

18/12/2019, 21:31

### Average Store Purchase (\$)

88,75

18/12/2019, 21:31

### Total Club Points

115

18/12/2019, 21:31

### Lifetime Spend (\$)

2.310

18/12/2019, 21:31



- Home
- Customers
- Segments
- Measures
- Intelligence
- Data
- Data sources
- Entities
- Unify
- Enrichment
- Activities
- Relationships
- Admin

Save Discard changes

Back to Segments

### Summer Promo

Created 18/12/2019, 20:47 by admin@CRM322486.onmicrosoft.com

Edited 18/12/2019, 20:47 by admin@CRM322486.onmicrosoft.com

Dynamic

**Group 1: Filter defined using Customer\_Measure : CustomerInsights entity**

Customer_Measure : CustomerInsights	Average Store Purchase (\$)	greater than equal to	113	X	+
And	Customer : CustomerInsights (Customer_Measu...	DateOfBirth	less than equal to	12/31/1996	X
And	Customer : CustomerInsights	All records		X	

+ And + Or

+ Add Group

# Customer cards & Dynamics 365 integration

The image displays two overlapping digital screens. The left screen shows a 'CUSTOMER PROFILE' for 'Niels Snabe', a marketing manager at Tivoli. The profile includes personal details like gender (Male) and family status (Married), as well as purchase history (last purchase: 1/29/19). It also features a 'DATA SOURCES AND SEGMENTATION' diagram and a bar chart of 'INTERESTS' such as Movies & Films, Wedding Planning, and Personalized Gifts. The right screen shows the Dynamics 365 interface for an 'APAC Expansion' opportunity. It displays a sales process timeline (Qualify, Develop, Propose, Close) and a summary of key details: contact (Alex Wu), account (Northwind Traders), purchase timeframe (This Quarter), currency (US Dollar), budget amount (\$125,000.00), and purchase process (Committee). The interface also includes a 'Timeline' of recent activities and a 'Relationship Assistant' section highlighting 'Upsell potential' for Northwind Traders.

Customer Insights

Environment: Contoso Coffee (CRM3...)

+ Add destination → Export

### Export destinations (preview)

Display name	Type	Created	Actions
Contact Export		15/01/2020, 10:55	

#### Add destination

Type:

Only segments can be exported with this type.

Server address:

Server admin account:

Indicate which Customer Insights field matches the Dynamics 365 Contact ID:

Display name:

You can change this later.






Dynamics 365 Sales Hub Sales > Marketing Lists

My Active Marketing Lists

Name	Type	Marketing List Member Type	Last Used On	Purpose
HighValueOnlineCustomers	Static	Contact	---	---
SummerPromotion	Static	Contact	---	---

1 - 2 of 2 (0 selected)



-  Home
-  Customer Search
-  Store Locator
-  Contoso Coffee
-  Contoso Machines







**Abbie Moss**

abbie\_moss@collinsreedandhoward.com

LOYID\_1000



129 Miller Plaza  
Fairfield  
California  
10753  
USA

### Customer Check-In

Contoso Club Members can check-in for rewards and personalised recommendations



### Activity

- Purchased a product In-Store**  
May 24, 2019
- Purchased a product In-Store**  
April 19, 2019
- Satisfied with my product**  
January 22, 2019
- Purchased a product online**  
January 20, 2019
- Purchased a product In-Store**  
December 14, 2018

Current Points



Lifetime Value



### Recommendations





Service

*"With Dynamics 365 Customer Insights, we can look back and forward to create a unique and unforgettable customer experience."*

**Bernt Bisgaard Caspersen**  
Head of Solution Team & Architecture

## Tivoli Gardens theme park delights and charms guests

- Reduce churn with AI-driven insights
- Increase visit frequency with personalized communications
- Tailor customer service interactions with personalized activity recommendations

**TIVOLI**  
.....

[Video: Tivoli Gardens delights guests with Dynamics 365 Customer Insights](#)





Marketing

*"Dynamics 365 Customer Insights helps us to segment the right audiences, to focus on them, to engage them in a very relevant way, and to retain them."*

*Astrid van Vonderen  
Head of Fundraising*

## UNICEF accelerates donor engagement to drive higher impact in saving and improving children's lives

- Transform donors to real lifetime supporters of UNICEF
- Raise more funds with precise segmentation and AI-driven insights
- Increase involvement with personalized communications



[Video: UNICEF inspires donors with Microsoft Dynamics 365 Customer Insights](#)

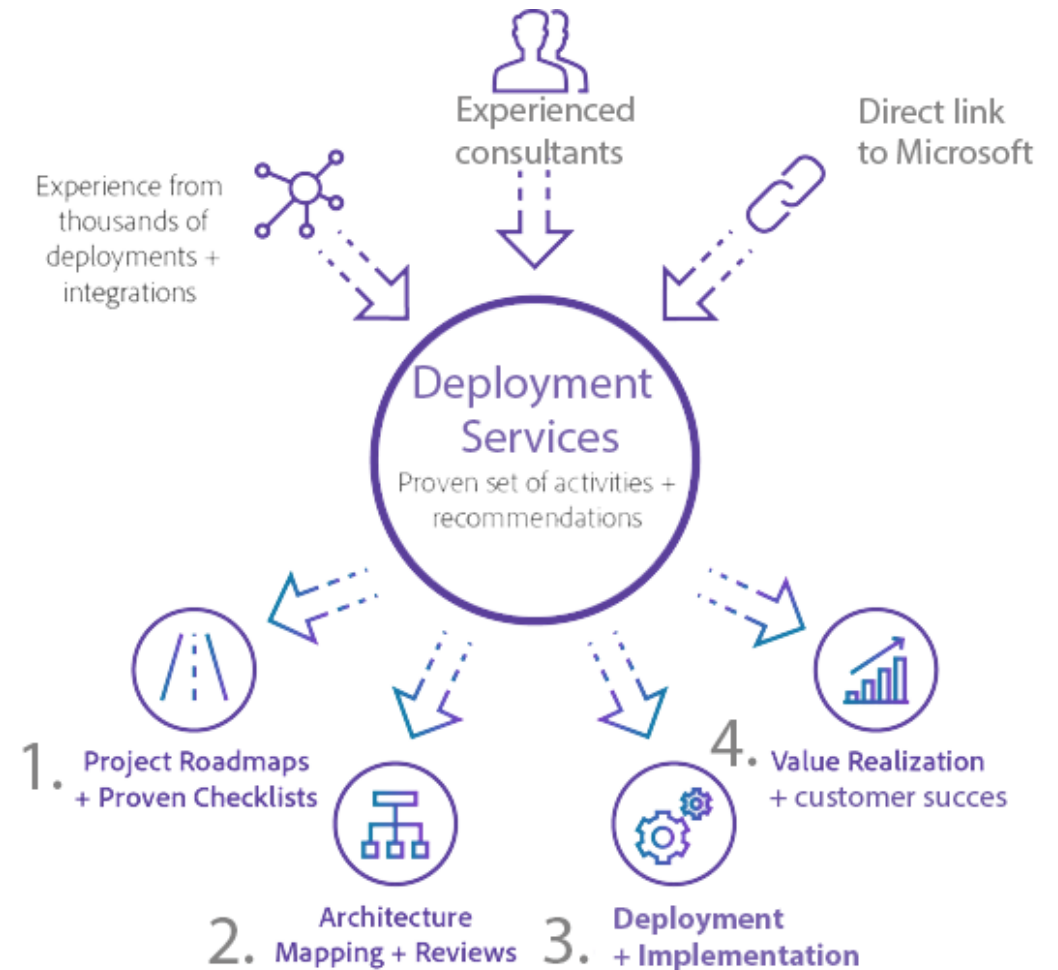
# Customer Insights in a Day

- Workshop @Microsoft
- Dates:

# Aanpak & Methodiek Implementatie

BusinessBase heeft ruim 20 jaar ervaring en heeft meer dan 200 organisaties geholpen met CRM, Customer Engagement en relatiebeheer. Met ruim 30 specialisten op het vlak van Customer Engagement houdt BusinessBase zich bezig met het mee bouwen aan de ambitie van haar klanten.

De gecombineerde kennis en implementatie methodiek leid tot bewezen succesvolle implementaties en een snellere time-to-value opleveren.





# Customer Insights offering

## Inspire & Learn



Proof of Concept  
Customer Insights

€ 19.500

Inclusief 1 jaar  
D365 Customer Insights

## Kickstart

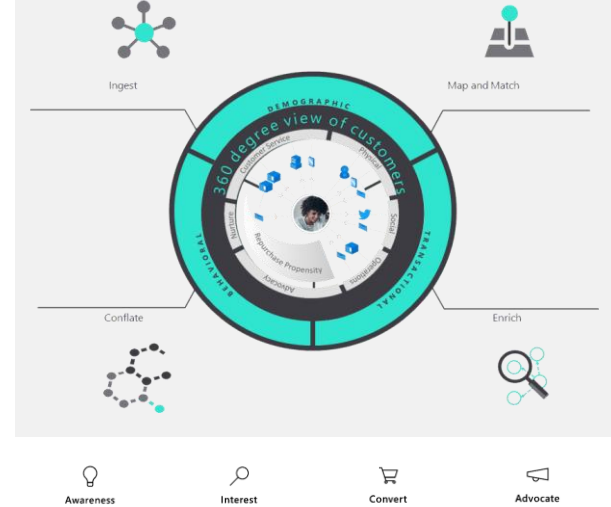


360-degree view  
Customer Insights

€ 32.900

Inclusief 1 jaar  
D365 Customer Insights

## Premium



Digitally  
transformed  
customer journey

€ 63.950

Inclusief 1 jaar  
D365 Customer Insights  
& D365 Marketing