

# Dynamics 365 Customer Insights

## Customer Insights in a Day



# Agenda

Time	Session
13:00	Registration and coffee
13:15	Introductions and Customer Insights overview
14:00	Customer Insights hands-on labs
15:15	Break
15:30	Customer Insights use cases & architecture
15:45	Customer Insights hands-on labs continued
16:45	Q&A and next steps

# Introductions & Objectives



# Your BusinessBase Team



**Timo Bax**

Chief Technical Officer at  
BusinessBase



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**Michael Uenk**

Chief Commercial Officer  
- Dynamics 365 Customer Engage...



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# A quick introduction of yourself

- Your name*
- Your company*
- Your role*
- Your experiences with Dynamics 365*
- Do you already know CI?*
- Goals for today?*





1970




1990



2010

# Reactive



Production line down



Service center operator logs issue



Emergency service visit



Customer disruption resolved





NITROGEN  
19ppm

Recommendation:  
25ppm

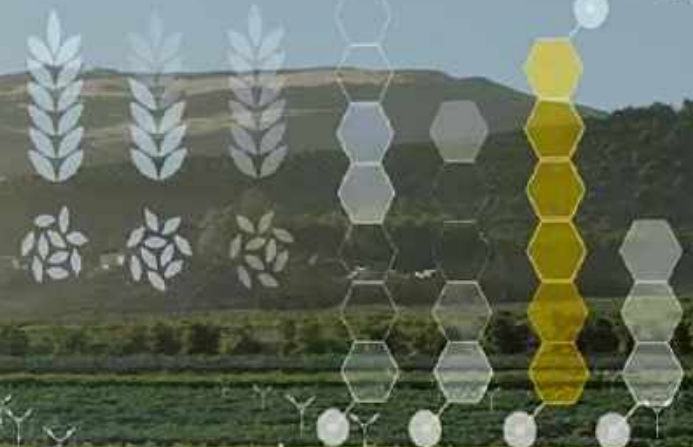
POPULATION  
45%  
189443

FOOD PRODUCTS  
56%  
69342

MOISTURE

±3%RH

TEMPER







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

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

BP stable  
Step 3 of 7; 4 hours remaining  
Primary incision made





EXIT

\$39

TAKE AN ADDITIONAL 20% OFF YOUR PURCHASE

RECEIVE 20% OFF YOUR PURCHASE

\$199


TAKE AN ADDITIONAL 20% OFF YOUR PURCHASE

Customer data recorded and applied

Smart device applies all sales available to items collected




# Reactive



Production line down



Service center operator logs issue



Emergency service visit



Customer disruption resolved





Data



Anomaly detection model

Proactive

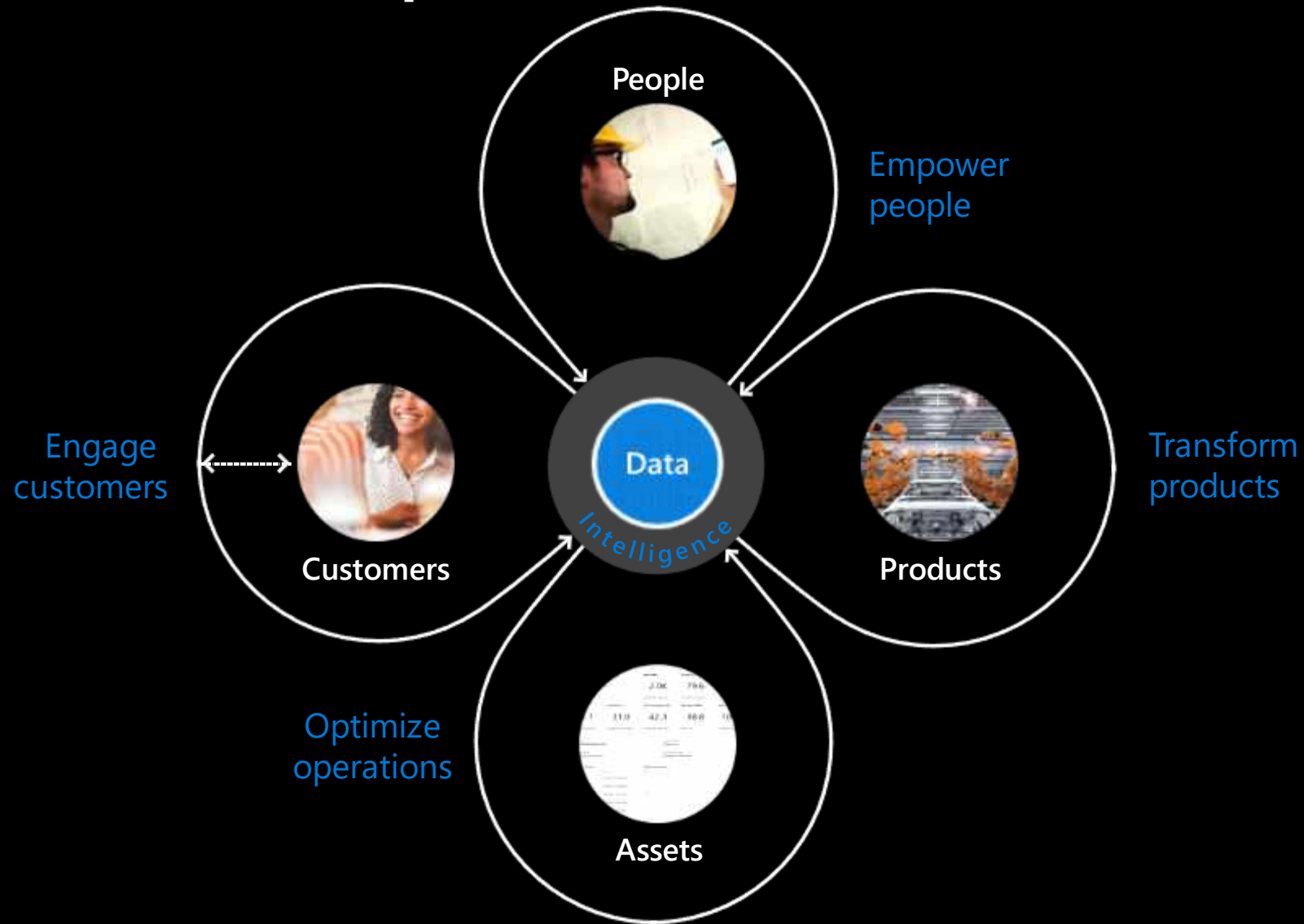


Proactive maintenance visit

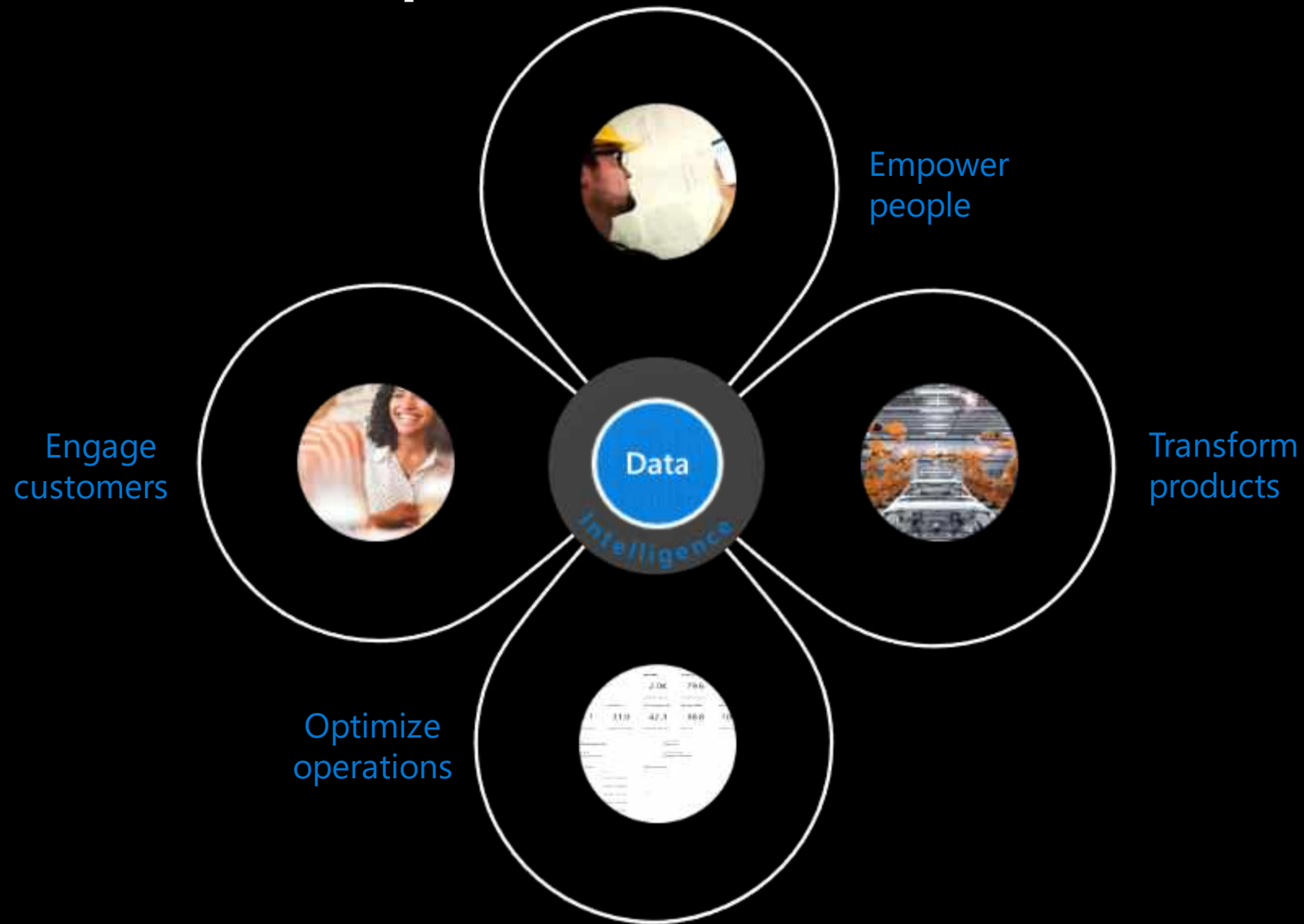


Customer never disrupted

# Digital feedback loop

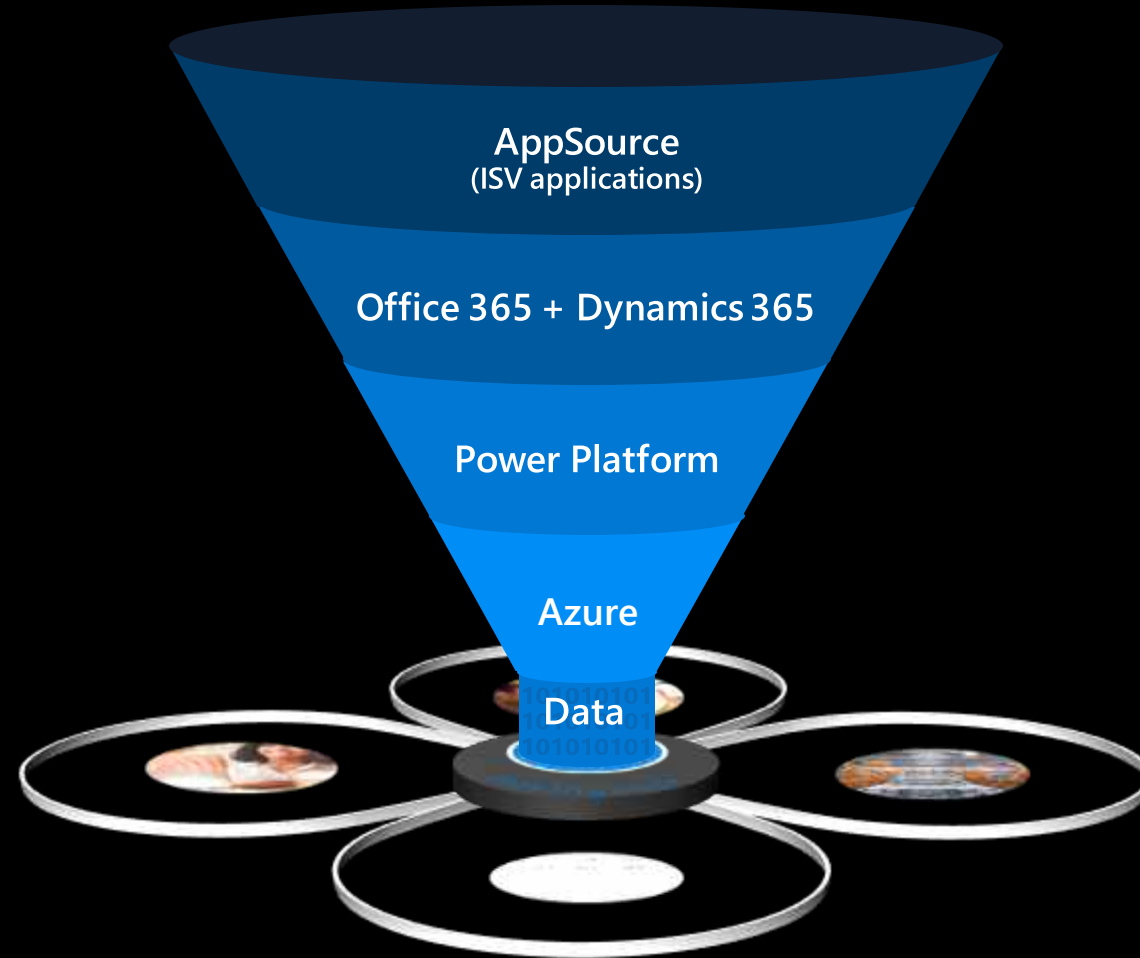


# Digital feedback loop





# Digital feedback loop



# Microsoft Power Platform



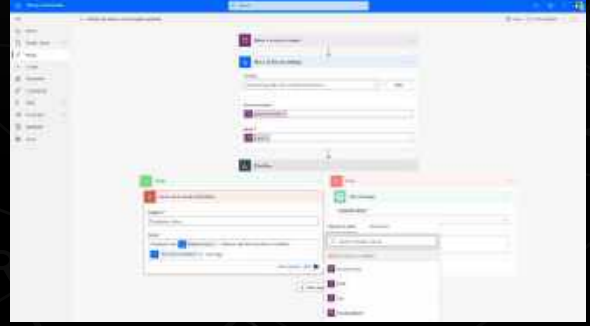
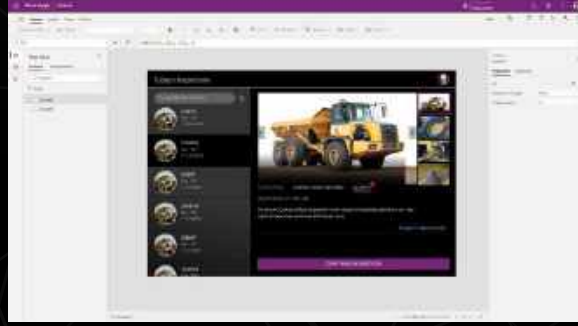
Power BI



Power Apps



Power Automate



**Common Data Service**



Connectors to hundreds of data sources

# Microsoft Power Platform



Power BI



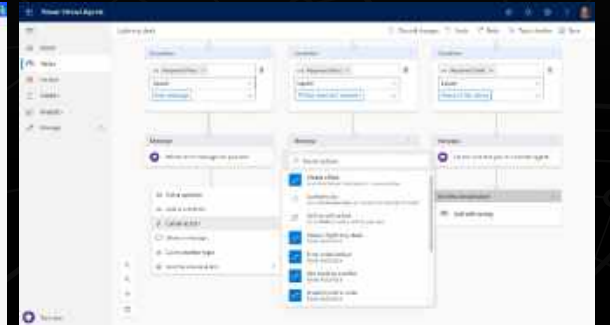
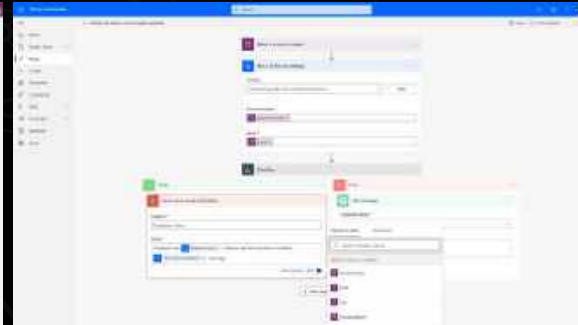
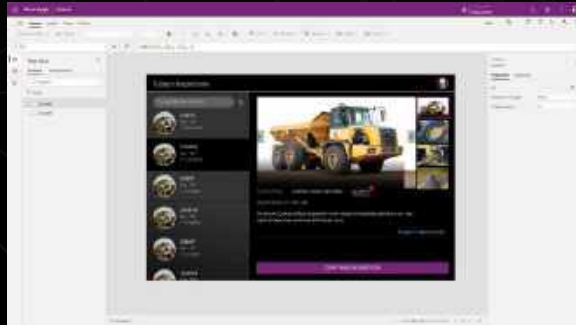
Power Apps



Power Automate



Power Virtual Agents



## Common Data Service



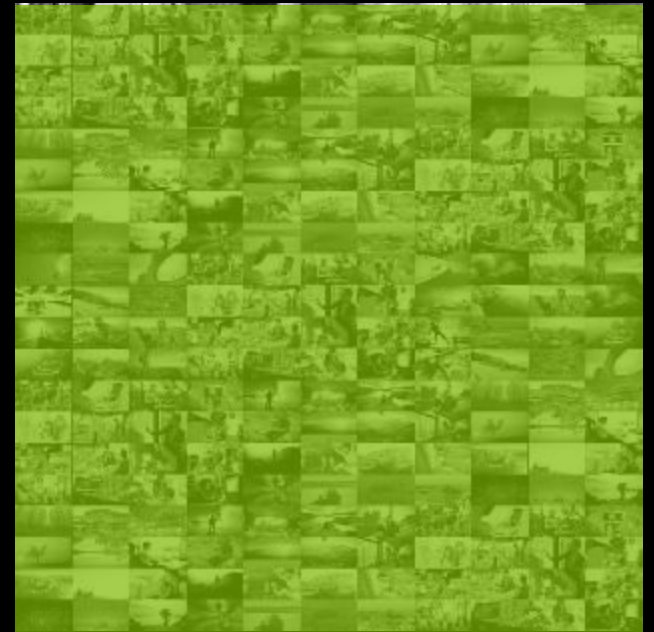
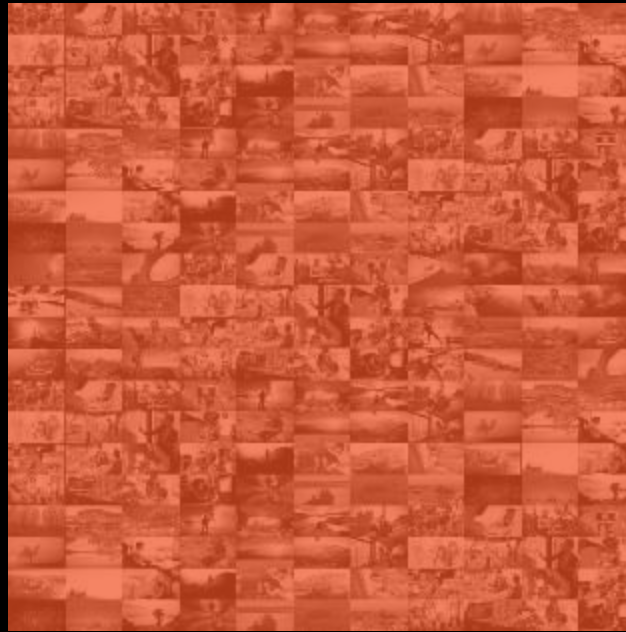
Connectors to hundreds of data sources



**Get more value from your data**

# Microsoft mission

Empower every person and every organization on the planet to achieve more





1975

2014

2000

From knowing it all.....to learning it all





***"It's not just about technology.***

*Technologies will come and go, so you need to be able to both ask and answer the question: **What do you do as a company, why do you exist?***

*Listen to your **Customers and your Employees**, they are the most important thing and define your business."*

Satya Nadella  
CEO, Microsoft

# Unified Customer

Today more than  
ever, **Customers**  
are in the  
**driver's seat**



# Microsoft's perspective for enabling intelligent retail



Know your customers



Empower your employees



Deliver intelligent operations



Reimagine retail



Create personal experiences, unlock new opportunities with data & predictive AI



Enable secure digital collaboration across your business and reduce costs



Gain visibility across your end-to-end supply chain using technology solutions



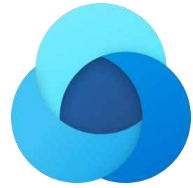
Create innovative Customer experiences and optimize in-store operations





 Microsoft Dynamics 365

Customer Insights



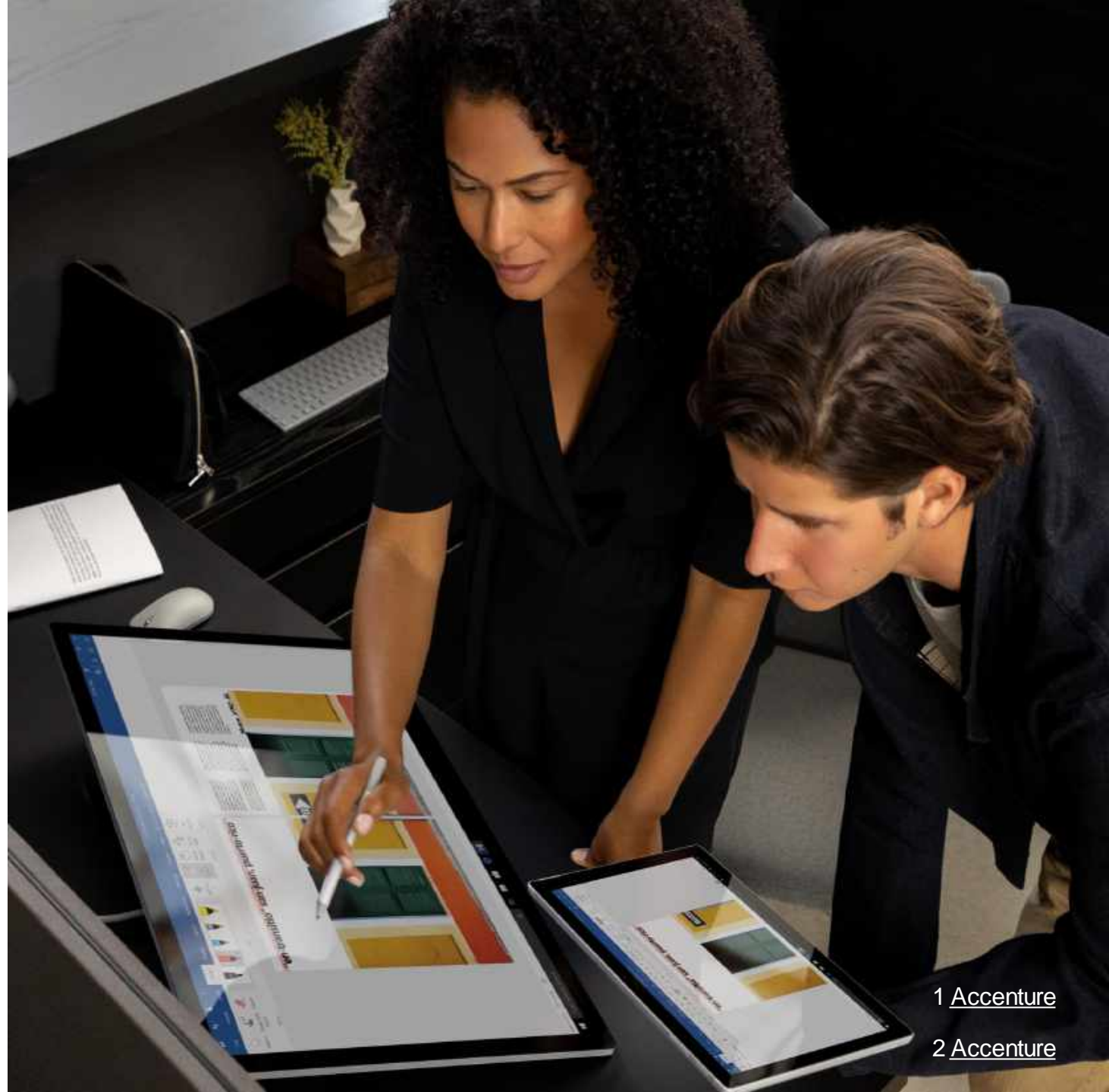
# Customer expectations are growing

91%

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

81%

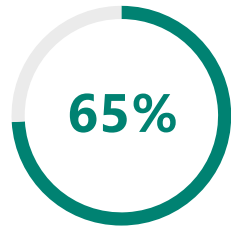
of buyers want brands to get to know them and understand when to approach them and when not to. <sup>2</sup>



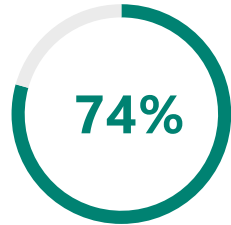
1 [Accenture](#)

2 [Accenture](#)

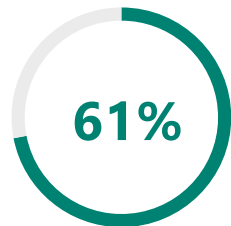
# Today's experiences are falling short



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



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



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](#)



# Digital Transformation is rapidly changing the business landscape...

Sell products and services separately



Sell products, services and outcomes

One and done, transactional



Personalized, Customer lifetime value

Primarily human interactions & reactions



Proactive, observational / IoT to detect, and drive action

Data entered into a CRM/ERP system



Customer, Product data comes first

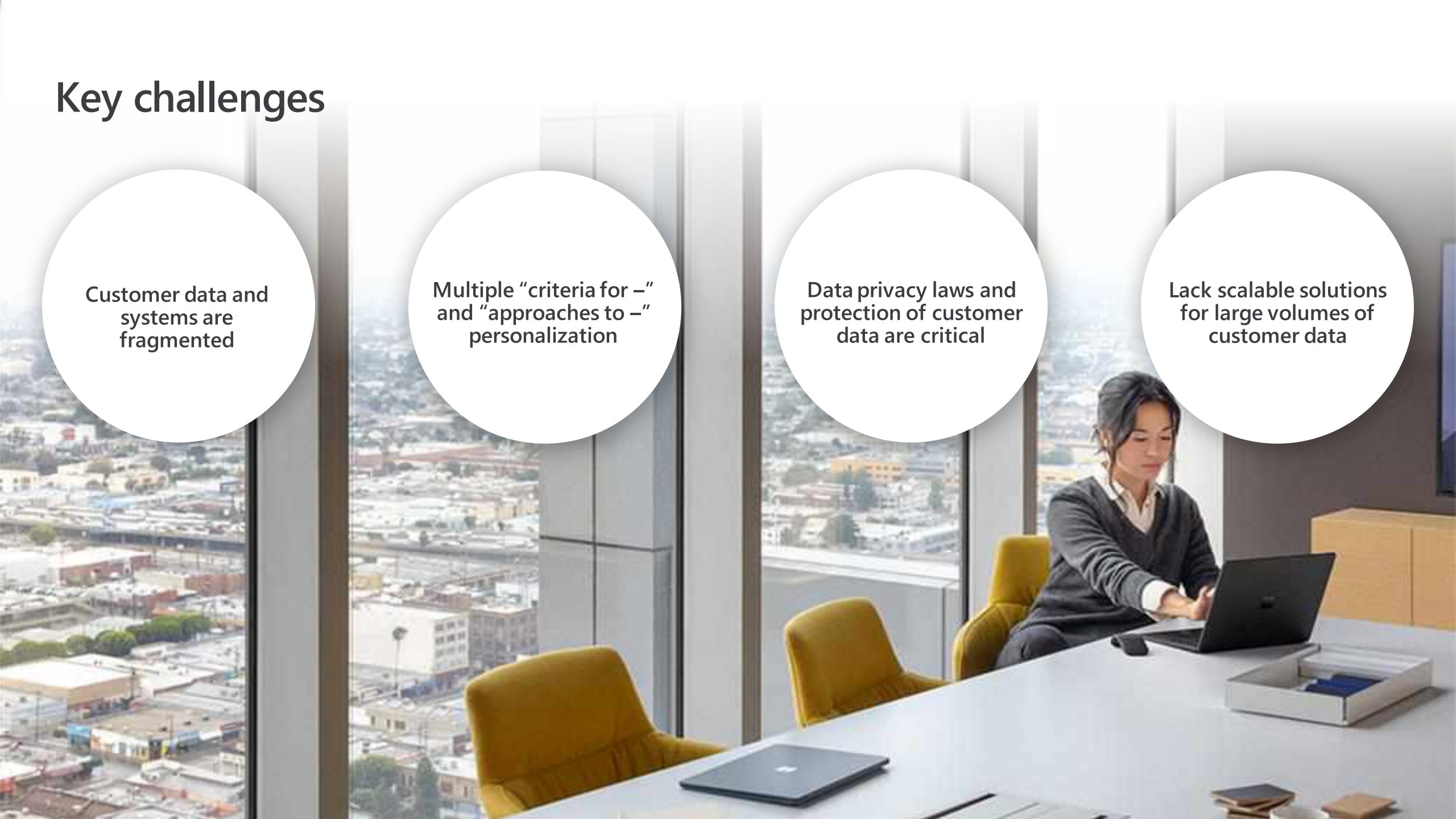
# Key challenges

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



# The need for a Customer Data Platform (CDP)

- Organizations want to build meaningful customer relationships at every touchpoint
- Customer data is typically siloed in disparate systems, limiting organization's ability to make use of the data
- With CDPs, companies can "*efficiently collect, manage and use their customer data\**" across the entire customer journey
- Delivering personalized experiences built on holistic customer profiles and intelligent insights





# 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



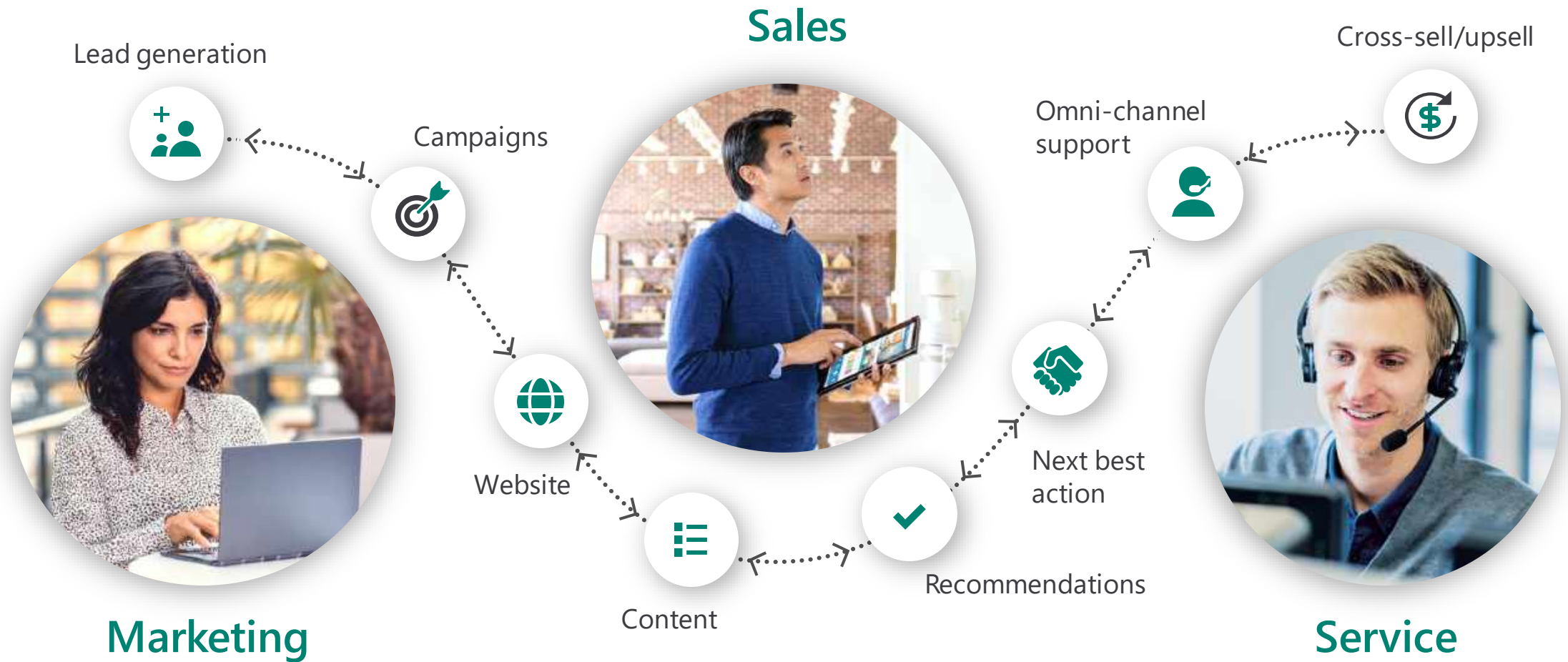
Adapt and extend



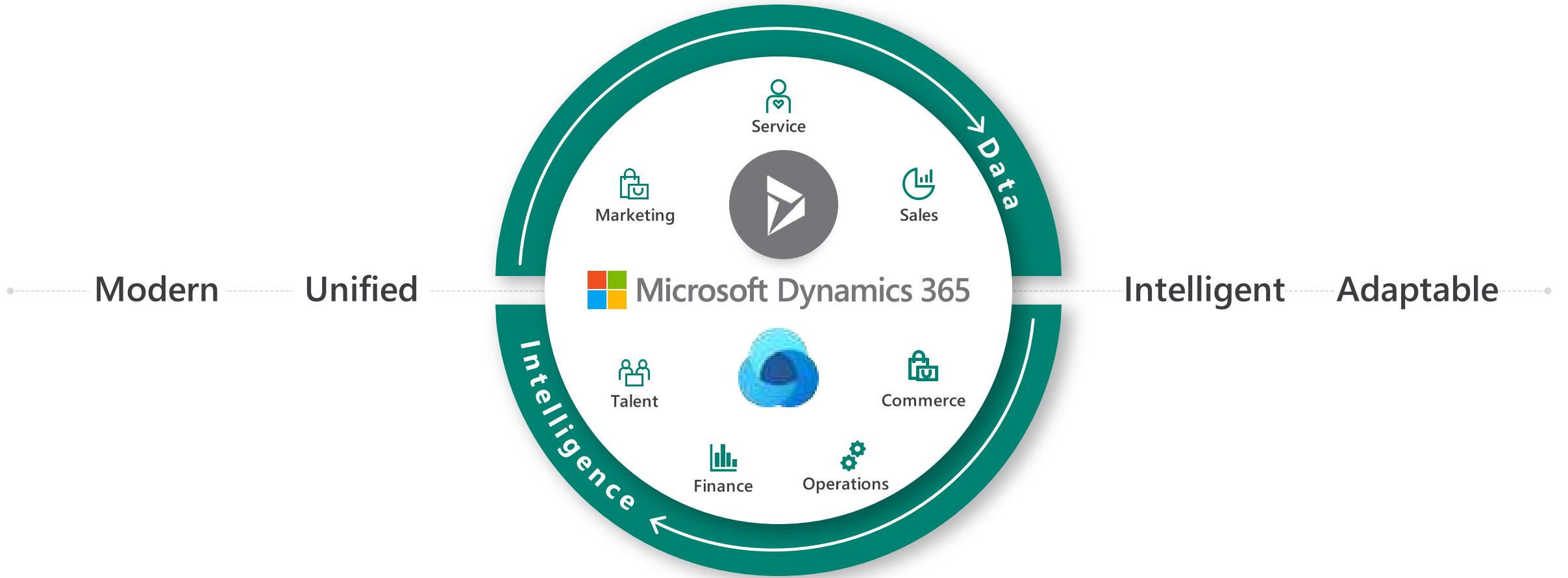
Rely on a productive and trusted platform



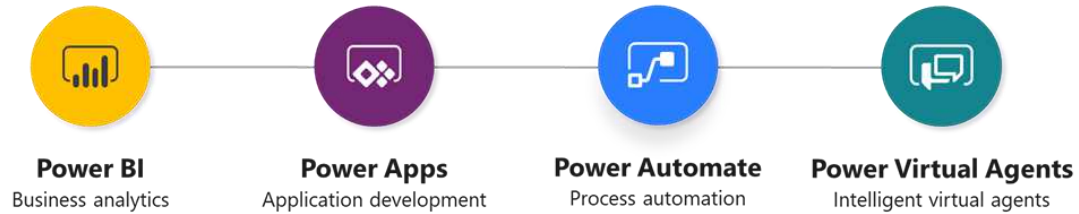
# Power end-to-end customer experiences







### Power platform



# Dynamics 365 Customer Insights done differently

## Traditional customer analytics



Custom build on analytics platform

Hard coded

Hard to adapt

Siloed apps

Time to implement measured in months

Requires deep technical expertise

Different stacks for storage, KPI calculations, ML, app experiences

Compliance as an afterthought

## Dynamics 365 Customer Insights



Finished SaaS solution

Configurable

Extensible

Insights embeddable into operational CRM of choice

Time to implement measured in weeks

Ready to run by business users

Integrated in one finished solution based on hyper-scale cloud platform

Compliant by design

# Workshop Overview

Contoso Coffee





# Introducing Contoso Coffee

Contoso Coffee produce high-quality coffee and coffee machines, which they retail through channels including new Contoso Retail Stores in premium locations, premium food resellers and the Contoso Coffee Web Site.

Contoso plan to further expand their offerings with Contoso Cafés and a new Connected Coffee Machine which can trigger refill orders and alert Contoso service about any issues.

This new offering will help them to build direct relationship with their customers and learn more about how customers consume their products



# Introducing Contoso Coffee

## Transactional Relationship

Existing business model means that they have lack of direct relationship with their customer.

## Data Silos

Unable to deliver personalised customer experiences

## Business Objective

Own and build a meaningful, direct relationship with all consumers to deliver an exceptional, personalised customer experience through relevant communications, personalised recommendations and services.

Increase customer attraction and retention by making customers feel valued through experiences that customers love



# Existing Data Landscape

## Fractured Customer Data

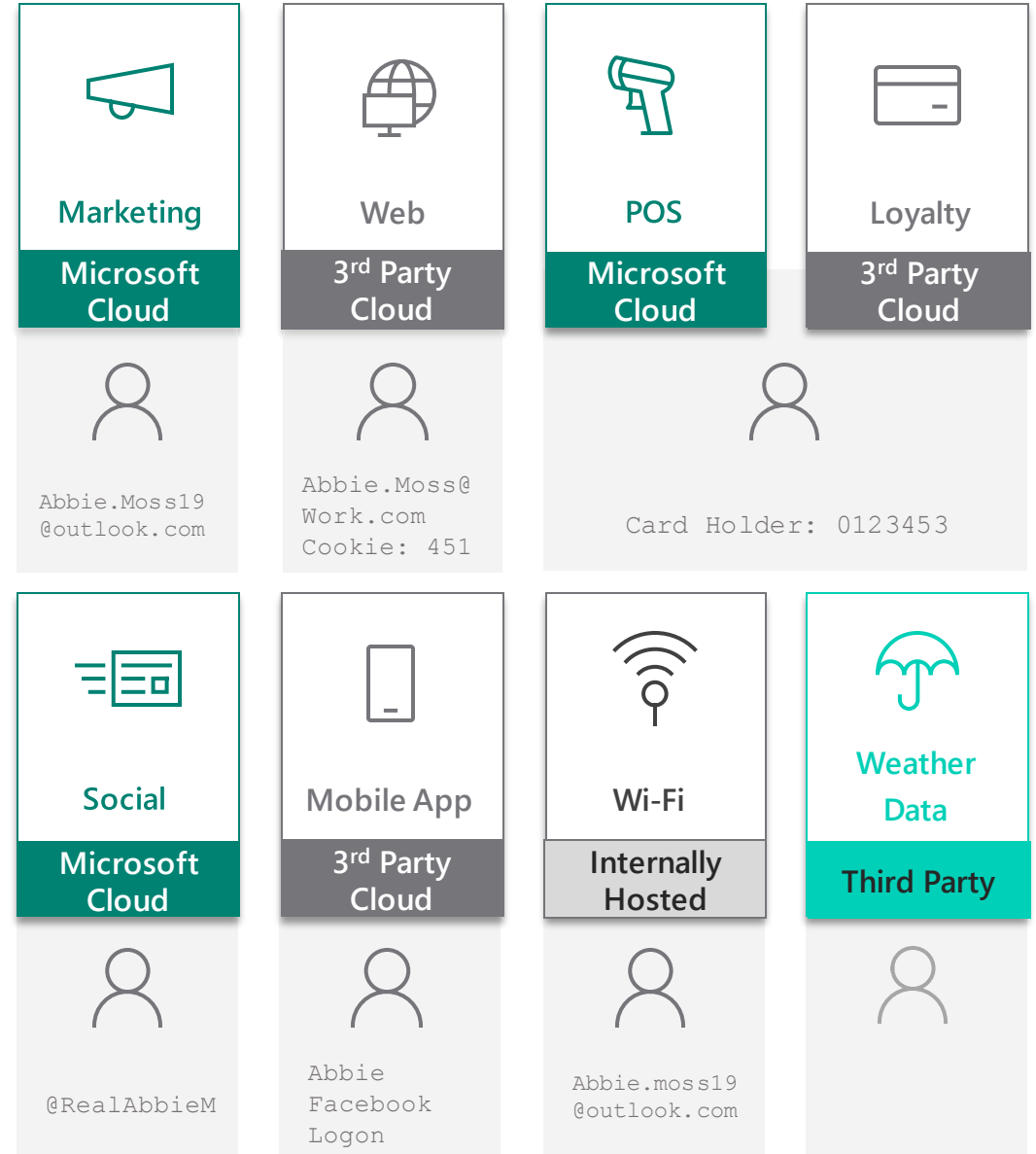
With multiple systems, Contoso has multiple records for the same person. This causes a disjointed experience to the customer who expects to be treated as one person regardless of the channel they are transacting upon.

## Multiple Platforms

The architecture at Contoso has evolved through acquisition and legacy systems meaning that data can reside in not only different systems, but different platforms across multiple clouds and on premise.

## Non-Customer Data

Contoso are drawing correlations between non-customer data and the impact it has on customer experiences, including data from third parties such as weather data.

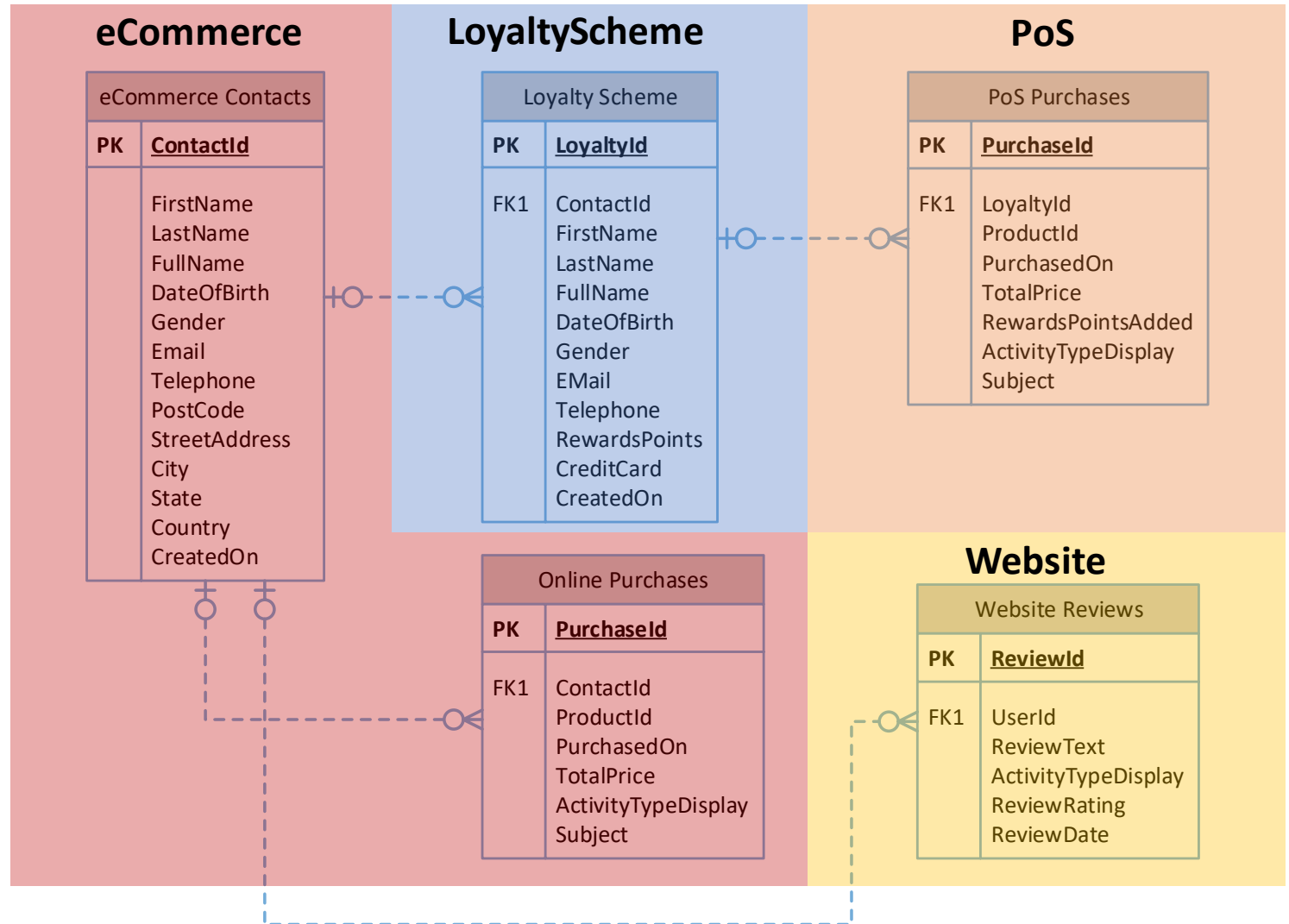




# Datamodel

## Data Sources

- eCommerce: contacts & purchases
- Point of Sales: purchases
- Loyalty
- Website



# Lab Introduction

## Contoso Coffee Customer Insights Project

Contoso management is tasking IT and Line of Business teams with the following:

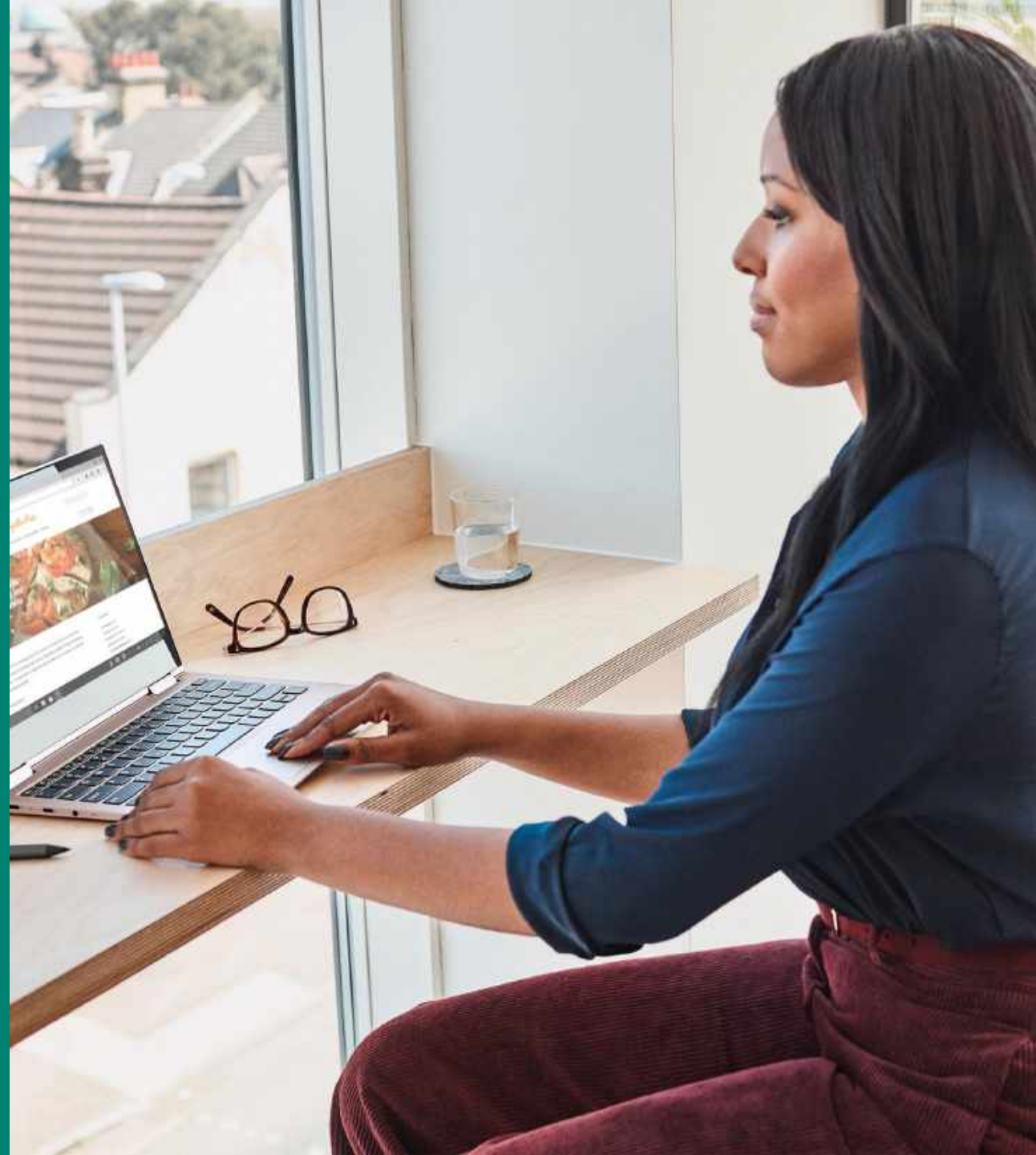
- Establish a customer data platform combining all customer related data from siloed sources
- Realise a unified Contoso Customer profile
- Calculate measures for all channels offered by Contoso
- Target customers with high engagement score for online channels with a focused retention campaign
- Provide a 360-degree view of the customer for service agents (embedded into D365 for Service)
- Deliver a Contoso Coffee Greeter App, to enable in store retail staff to deliver personalised service and recommendations.
- Use PowerBI to uncover further insights for different functions of the Contoso Coffee business.





# Lab 1

## Data Ingestion and Unification





# Key phases



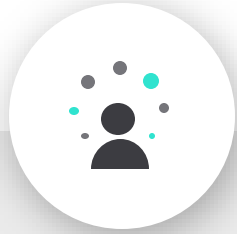
## Ingestion

Bring customer and activity data from all sources



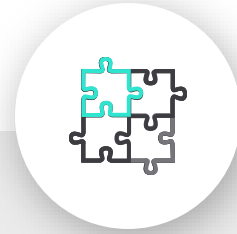
## Mapping and matching

Identify and understand profile data from transactional and observational sources



## Conflation

Consolidate data into a single customer profile with source lineage



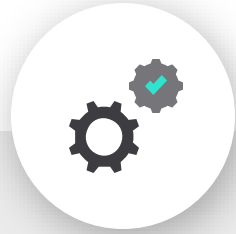
## Enrichment

Enrich profiles using AI models and proprietary signals from Microsoft Graph



## Insights

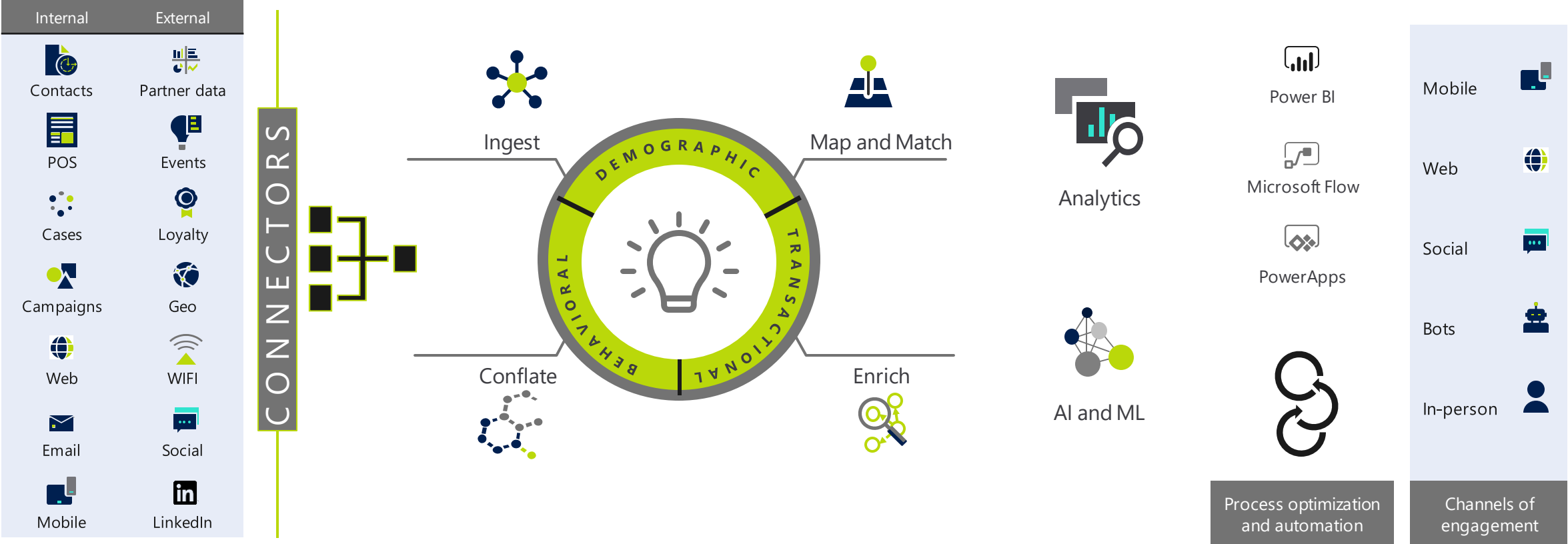
Derive insights that automate and optimize processes



## Action

Leverage insights across all channels of engagement with connectors and APIs

# Our approach



•----- **Data** ----- **Unification** ----- **Insights** ----- **Action** -----•

# Ingesting Data into Customer Insights

- CI leverages Power Query dataflows to ingest data.
- We currently support the following connectors: Common Data Service for Apps (Dynamics), Text/CSV, Excel, Exchange, XML, Odata, Azure Blobs and different databases

## 6 Steps to Ingest Data

1. Create new data source
2. Select right connector
3. Add and review entities
4. Apply transformations
5. Save query, start ingestion and validate results
6. Schedule refresh cycles



# Tips

- Follow the exact steps from the documentation including naming
- Data Sources versus Entities: the eCommerce data source will contain 2 entities, while all other data source will have 1 entity
- Both the datasource and entity have their own name

### Data sources

Name	Entities	Actions
eCommerce	2	⋮
LoyaltyScheme	1	⋮
PoS	1	⋮
Website	1	⋮

### Queries

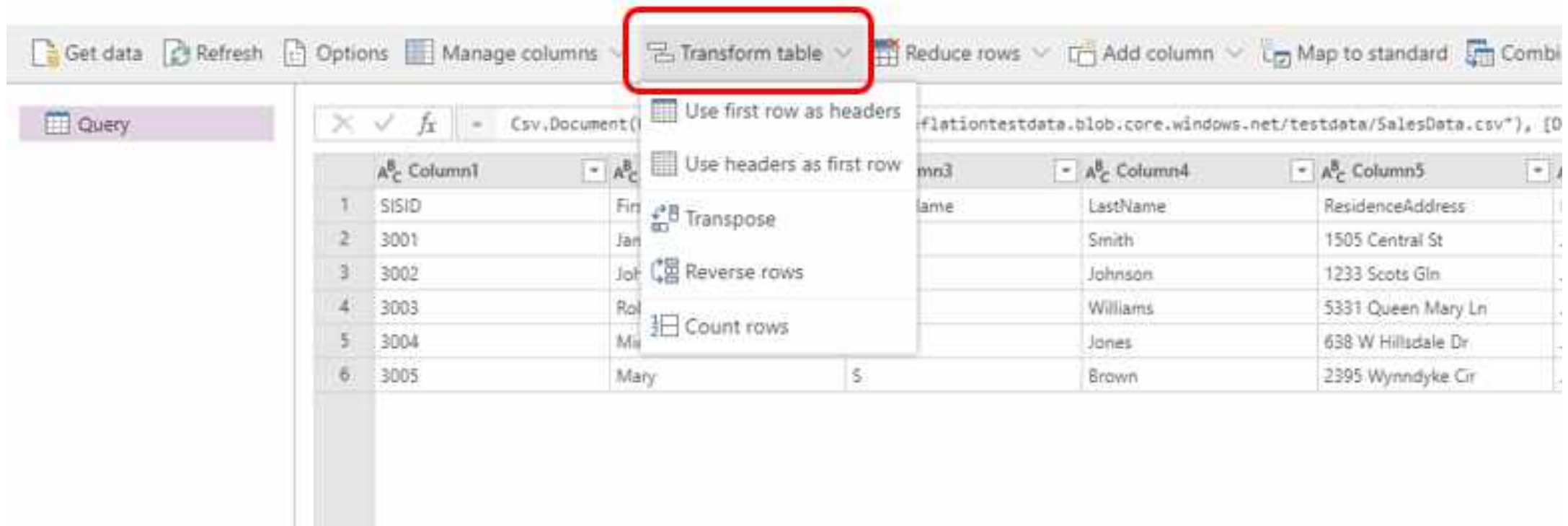
- eCommerceContacts
- eCommercePurchases

`= Table.TransformColumnTypes("#Promoted headers", {"DateOfBi`

	A <sup>B</sup> <sub>C</sub> ContactId	A <sup>B</sup> <sub>C</sub> FirstName	A <sup>B</sup> <sub>C</sub> LastName	A <sup>B</sup> <sub>C</sub> FullName
1	CNTID_1000	Abbie	Moss	Abbie Moss
2	CNTID_1001	Kenneth	Beraun	Beraun Kenneth
3	CNTID_1002	Anthony	Koteles	Anthony Koteles
4	CNTID_1003	Michael	Lauser	Michael Lauser
5	CNTID_1004	Richard	Nakada	Nakada Richard
6	f4444de5-664e-e911-a9ac-000d3a2d57...	Robert	Kaucher	Kaucher Robert
7	CNTID_1006	Steven	Biondi	Steven Biondi
8	CNTID_1007	Michael	Manni	Manni Michael
9	CNTID_1008	Michael	Glenna	Michael Glenna
10	CNTID_1009	James	Eiler	James Ecler

## 6 easy steps to get started

1. Create new data source
2. Select right connector
3. Add and review entities
4. Apply transformations
5. Save query, start ingestion and validate results
6. Schedule refresh cycles



The screenshot shows a data transformation tool interface. The top toolbar includes buttons for 'Get data', 'Refresh', 'Options', 'Manage columns', 'Transform table', 'Reduce rows', 'Add column', 'Map to standard', and 'Combine'. The 'Transform table' button is highlighted with a red box. A dropdown menu is open below it, listing the following options: 'Use first row as headers', 'Use headers as first row', 'Transpose', 'Reverse rows', and 'Count rows'. The main data table is visible below the menu, with columns labeled 'Column1' through 'Column5' and rows of data.

	Column1	Column2	Column3	Column4	Column5
1	SISID	First	LastName	ResidenceAddress	
2	3001	Jan	Smith	1505 Central St	
3	3002	John	Johnson	1233 Scots Gin	
4	3003	Robert	Williams	5331 Queen Mary Ln	
5	3004	Mary	Jones	638 W Hillsdale Dr	
6	3005	Mary	Brown	2395 Wynndyke Cir	

# Unifying Data in Customer Insights

- The data unification process lets you unify data sources that were once disparate into a single master customer dataset that provides a holistic view of your customers, a unified customer profile.
- The steps are mandatory and are performed in the exact order as described
- Matched profiles most likely will not have a direct link (e.g. customer number), but matching needs to be done on values like name and/or email address
- All three steps use AI and machine learning to automate selections, but also match data in different formats or with errors (e.g. typos)

## 3 Steps to Unify Data

1. **Map**
2. **Match**
3. **Merge**



# Step 1: Map

- Mapping the data sources profiles fields to the Unified Customer Profile fields (based on the common data model)
- Select the entities that need to be mapped
- Validate and potentially correct (add and/or edit) the mapped fields per entity
- Mark the primary key per entity

Save Discard changes

← Back to Unify

## Map

Define customer data in your entities by choosing the customer fields, primary key and types.

Entities	Select	Fields in loyCustomers	Primary key	Type
eCommerce eCommerceContacts	<input type="checkbox"/>	Name	<input type="checkbox"/>	
	<input type="checkbox"/>	LoyaltyId	<input checked="" type="radio"/>	ID
	<input type="checkbox"/>	ContactId	<input type="radio"/>	ID
LoyaltyScheme loyCustomers	<input checked="" type="checkbox"/>	FirstName	<input type="radio"/>	Person.FirstName
	<input type="checkbox"/>	LastName	<input type="radio"/>	Person.LastName
	<input type="checkbox"/>	FullName	<input type="radio"/>	Person.FullName
	<input type="checkbox"/>	DateOfBirth	<input type="radio"/>	Person.BirthDate
	<input type="checkbox"/>	Gender	<input type="radio"/>	Person.Gender
	<input type="checkbox"/>	EMail	<input type="radio"/>	Identity.Service.Email

## Step 2: Match

- Specify the match order
- Identify how your entities are linked together, setting the rules
- Rules can contain multiple conditions (always AND), each with its own precision
- Precision (basic or custom) determines how exact the match will be performed (e.g. exact means: 100% identical). With custom the match probability threshold can be configured
- Normalizations determines how the data is treated, for example by removing punctuation or spaces
- Run the match
- Review, validate and optimize

### New rule ✕

Set conditions on how you will match by choosing equivalent fields in entities.

**Name** <sup>+</sup>

FullName; Email

You can change this later.

#### Conditions

Entity	Field	Precision
eCommerceContacts : eCom...	FullName	<input type="range" value="High"/>
loyCustomers : LoyaltyScheme	FullName	Normalize Type (Phone, Name)
eCommerceContacts : eCom...	Email	<input type="range" value="High"/>
loyCustomers : LoyaltyScheme	Email	Normalize Select options

### Match

Identify the unique customers in your entities by matching records of customers.

Unique customers

3004

Matched records

1017

Updated: 1/26/19, 2:33 PM [View last run](#)

Match order			
Order	Name	All records	Records matched
1	ContactCSV : TestData	2,000	50%
2	WebAccountCSV : TestData	2,000	50%
3	CallRecordsEmail : TestData	48	100%

[✎ Edit](#)

## Step 3: Merge

- Merging reconciles conflicting data, for example a customer name that is different in two data sources
- Review the system recommendations
- Add, remove or merge attributes
- Run the merge

The screenshot displays the 'Merge' configuration page in Dynamics 365 Customer Insights. The page title is 'Merge' and it includes a sub-header: 'Create an entity of customer profile by merging duplicate attributes and excluding attributes you don't need.' Below this is a table of 'Profile attributes'.

Name	Data source	Source
First Name (2)		
Last Name (2)		
Full Name (2)		
Date of Birth (2)		
Email (2)		
Telephone (2)		
Contact ID	contactsECO	ECOMMERCE
Loyalty ID	contactsLOY	ECOMMERCE
First Name	contactsECO	ECOMMERCE
Street Address	contactsECO	ECOMMERCE
City	contactsECO	ECOMMERCE
State	contactsECO	ECOMMERCE
Country	contactsECO	ECOMMERCE
Contact ID	contactsLOY	ECOMMERCE

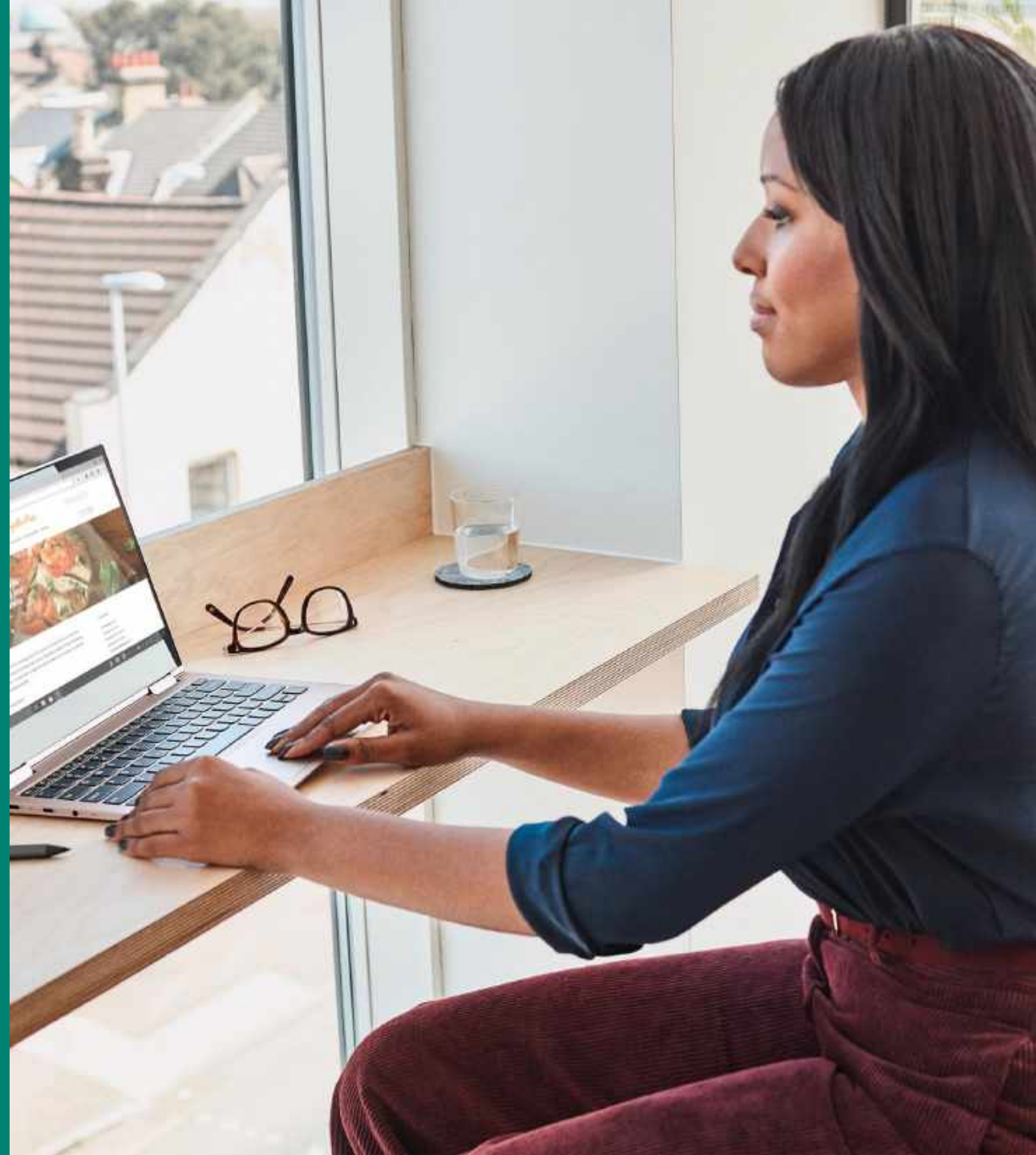
Below the table, there is an 'Excluded from profile' section which is currently empty.





# Lab 2

## Relationships and Measures



# Business Goals

Business drivers	Business outcome	Top KPIs		
Growth	Increase sales growth / cross sell	Conversion rate	Average order value	Customer Lifetime Value
	Increase customer retention	Brand affinity	Net promoter score	Customer churn rate
Cost	Reduce cost to serve	Returns rate	Customer engagement score	Customer count
	Average call handling time	Call / case deflection	IT costs	

What

How

If

# Calculating Measures with Customer Insights

Measures enables you to define all the KPIs that best reflect your business performance and stage. It includes both customer measures such as Lifetime Value, and business measures such as Monthly Active Users (MAU).

Once created, measures will light up in various locations: Home page, Dynamics 365 Customer Card, Power BI report, etc. You can also segment your customers by your Customer Attribute measures using Segments.

## 3 Types

- **Customer Attribute:** A single field per customer that reflects a score, value, or state for the customer. Customer attributes are created as attributes in a new system-generated entity called 'Customer\_Measure.'
- **Customer Measure:** Insights on customer behavior with breakdown by selected dimensions. A new entity is generated for each measure, potentially with multiple records per customer.
- **Business Measure:** Tracks your business performance and health of the business. Business measures can have two different outputs: a numeric output that shows on the Home page or a new entity that you find on the Entities page.

## Steps to create measures

1. Configure relationships
2. Create measure



# Configure Relationships

- Relationships connect entities based on common identifiers
- The result of creating relationship is also that related data can be reached starting from the unified profile

Add relationship X

To create a new relationship, specify how two entities are connected to each other.

Name \*

Description

<p><b>Source details</b></p> <p>Entity * <input style="width: 95%;" type="text"/></p> <p>Cardinality * <input style="width: 95%;" type="text"/></p>	<p><b>Target details</b></p> <p>Entity * <input style="width: 95%;" type="text"/></p> <p>Cardinality * <input style="width: 95%;" type="text"/></p>
<p><b>Key mappings</b></p> <p>Source key field(s) * <input style="width: 95%;" type="text"/></p>	<p>Target lookup/link field(s) * <input style="width: 95%;" type="text"/></p>

## Relationships

Name	Source entity	Source cardinality	Target entity
CustomerPurchasesECO	eCommercePurchases : eCom...	Many	Customer : Customer
CustomerPurchasesPOS	posPurchases : PoS	Many	Customer : Customer

# Creating Measures

- Define entities, variables and definitions
- In entities all entities that are needed to calculate the measure need to be selected
- Variables are intermediate values calculated from selected entities
- The measure definition defines how chosen entities and calculated variables are aggregated

Test Business measure

**Entities** ⓘ • ^

Invoices : SAPFinance ▾

+ Add entity

**Variables** ⓘ ^

+ New variable

**Measure definition** ⓘ • ^

+ New dimension

Function	Entity/variable	Field	As	Display name
Select fun... ▾	Select an entity... ▾	Select field... ▾		

# Customer Measures

- Creates multiple measures per customer profile
- The measures are divided into buckets or measures
- For example: the monthly PoS Purchases

Measure definition ⓘ \*

Entity	Field	Bucket	As	Display name
OnlinePurchases : Dynamics	PurchasedOn	Year	Yearly	Yearly
OnlinePurchases : Dynamics	PurchasedOn	Month	Monthly	Monthly

+ New dimension



# Six Measures for Contoso Coffee

## Business Measures

- Average Store Purchase Value
- Average Web Purchase Value

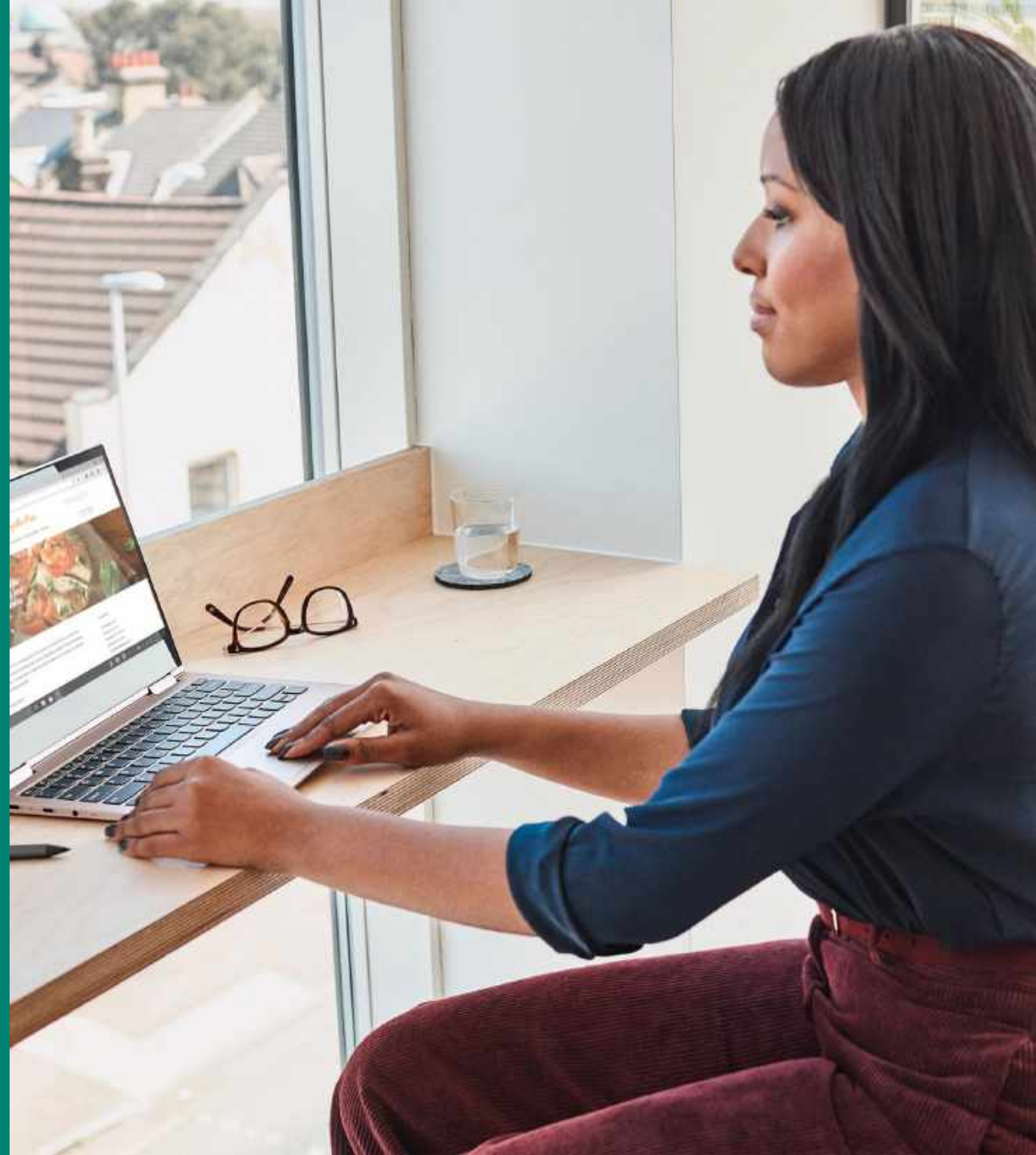
## Customer Attribute

- Lifetime Spend
- Total Club Points
- Average Store Purchase
- Average Web Purchase



# Lab 3

## Segments and Customer Cards



# Segmentation with Customer Insights

Segments allow you to group your customers based on demographic, transactional, or behavioral attributes.

While creating a segment, you can define complex filters around the customer entity and its graph of related entities.

Each segment, after processing outputs a set of customer entity records that satisfies the filter conditions. The records in the segment can be used to export and take action on.

## 2 Types

- **Static:** Processed only once upon segment creation or filter update.
- **Dynamic:** Processed according to a recurring schedule.



# Quick segments

- Create a segment starting from a profile or a measure
- Condition specified on a single attribute
- The quick segment shows a division based on the selected field
- The estimated segment size provides an indication of the size of the segment

## New quick segment

Create a segment based on the number of customers with a field's value.

### Condition

#### Field

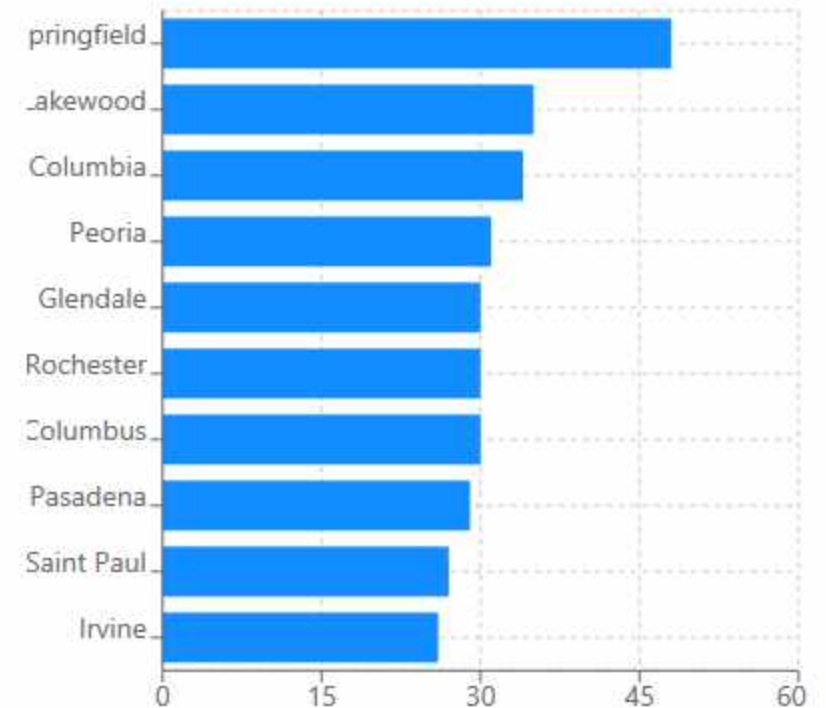
City

#### Value

Select values

- Springfield
- Lakewood
- Columbia
- Peoria
- Glendale
- Rochester

### Top City by customers



Review

Cancel

# Segment Builder

- Provides the options of creating a segment based on multiple conditions (based on AND and OR conditions)
- A segment can also contain multiple groups using Union, Intersect and Except options
- Segment keep track of the processing history in time

The screenshot displays the Segment Builder interface with two filter groups and a list of logical operators.

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

- Condition 1: Customer\_Measure : CustomerInsights (dropdown) | Average Web Purchase (\$) (dropdown) | greater than (operator)
- Condition 2: **And** (operator) | Customer : CustomerInsights (Customer\_Me... (dropdown) | All records (dropdown)
- Buttons: + And, + Or

**Logical Operators:**

- Union** (highlighted in blue)
- Intersect
- Except

**Group 2: Filter defined using Customer\_Measure : CustomerInsights entity**

- Condition 1: Customer\_Measure : CustomerInsights (dropdown) | Lifetime Spend (\$) (dropdown) | equals (operator)
- Buttons: + And, + Or

# Two Segments for Contoso Coffee

## High Value Online Customers

- Customers with a higher than average online purchase value
- Average value determined based on the created business measure

## Summer Promo

- Millennial customers with Store purchase value above average
- Customers born between 1981 and 1996
- Average value determined based on the created business measure

# Customer Cards

- The customer card is the visualization of the unified profile within the CI app, it shows a number of attributes in a card format
- When clicking the card the unified profile will be opened and all attributes, measures and segments will be shown

The screenshot displays the Microsoft Dynamics 365 Customer Insights (Preview) interface. The top navigation bar includes the Dynamics 365 logo, the application name 'Customer Insights (Preview)', and the environment 'CIAD'. A search bar for customers is located at the top right. The left sidebar contains a navigation menu with options: Home, Customers (selected), Segments, Measures, Data, Admin, System, Permissions, and Segment export. The main content area, titled 'Customers', shows a grid of customer cards. Each card displays a circular profile picture with initials, the customer's name and location, and key attributes such as DateOfBirth, Email, Telephone, PostCode, and StreetAddress.

Customer Name	Location	DateOfBirth	Email	Telephone	PostCode	StreetAddress
Brin Daricek	Overland Park	1970-05-24	brian_daricek@mendezlarso...	(851)743-3444x38523	85310	7633 Hernandez Club Suite 3...
Donalr Woolhouse	Garden Grove	2000-01-21	donald_woolhouse@stephen...	(223)146-6176x9066	32407	23642 Rachel Lodge
Brian Balceiro	Santa Ana	1970-09-07	brian_balceiro@ewingplc.com	001-354-045-6046x679	38283	5627 Nguyen Greens
Ronald Sode	Augusta	1996-07-06	ronald_sode@roweinc.com			
Brian Dabbraccio	Seattle	1995-04-30	brian_dabbraccio@gonzales...			
Rhnaled Buren	Peoria	2014-03-04	ronald_buren@rodriguezwilli...			



# Configure Search & filter index

- To search based on profile attributes a search & filter index needs to be configured
- Up to 20 attributes can be configured
- This will also allow for adding filter criteria and sorting (based on the type of the attribute)

The screenshot shows the 'Search & filter index' configuration page in Microsoft Dynamics 365 Customer Insights (Preview). The page is titled 'Search & filter index' and includes a 'Back to Customers' link. Below the title, there is a instruction: 'Specify the attributes used for searching and filtering on the Customers page.' A table titled 'Indexed attributes' lists the following attributes:

Name	Data type	Included in search
FirstName	String	✓
LastName	String	✓
DateOfBirth	String	✓
EMail	String	✓
Telephone	String	✓
PostCode	String	✓
StreetAddress	String	✓
City	String	✓

On the right side, there is a sidebar titled 'Add attributes to index' with the instruction 'Select up to 20 customer attributes.' Below this is a search bar and a list of attributes with checkboxes:

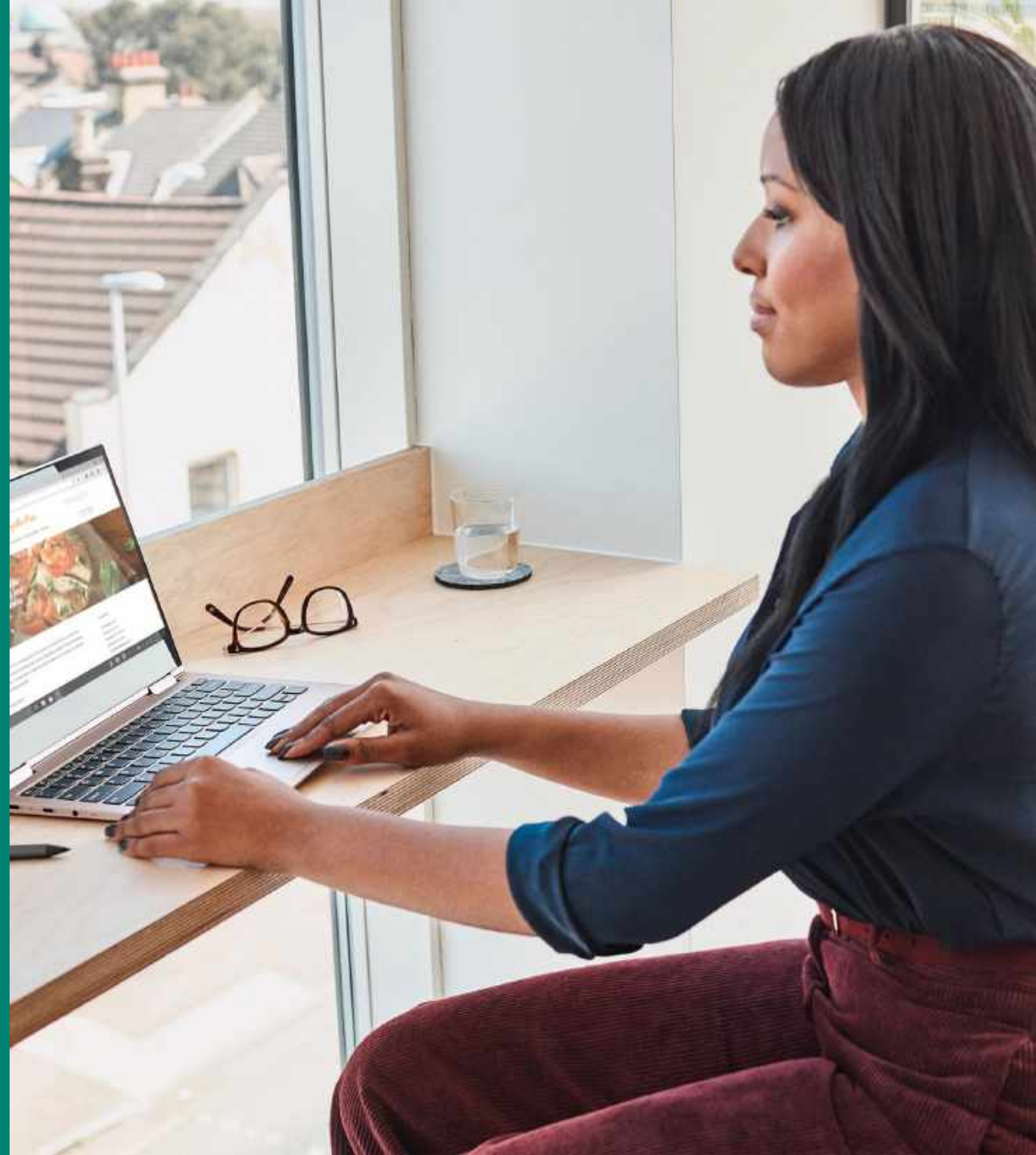
- CustomerId
- FirstName
- LastName
- FullName
- DateOfBirth
- EMail
- Telephone
- PostCode
- StreetAddress
- City
- State
- Country
- ContactTitle

A 'Cancel' button is visible at the bottom right of the sidebar.



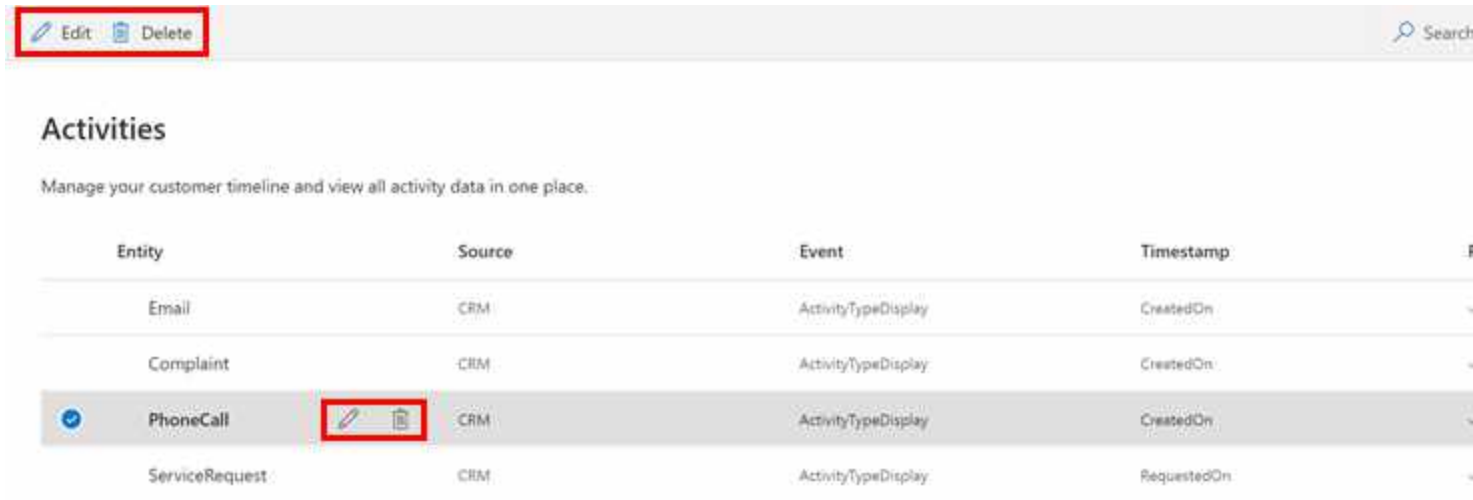
# Lab 4

## Activities and Enrichment



# Activities

- Appear on the timeline of a profile
- 'Things' to track that define interactions with the customer like orders, website review, emails, phone calls
- Can be shown in other Dynamics 365 apps
- A date attribute is required



Activities

Manage your customer timeline and view all activity data in one place.

Entity	Source	Event	Timestamp
Email	CRM	ActivityTypeDisplay	CreatedOn
Complaint	CRM	ActivityTypeDisplay	CreatedOn
<input checked="" type="checkbox"/> PhoneCall	CRM	ActivityTypeDisplay	CreatedOn
ServiceRequest	CRM	ActivityTypeDisplay	RequestedOn

# Data Enrichment

- Additional insights based on brand affinity and category interest
- Based on similar profiles to customer
- Uses data from the Microsoft Graph
- Configuration of demographic matching using date of birth, gender and zip code
- Additional enrichments possible, for example LeadSpace

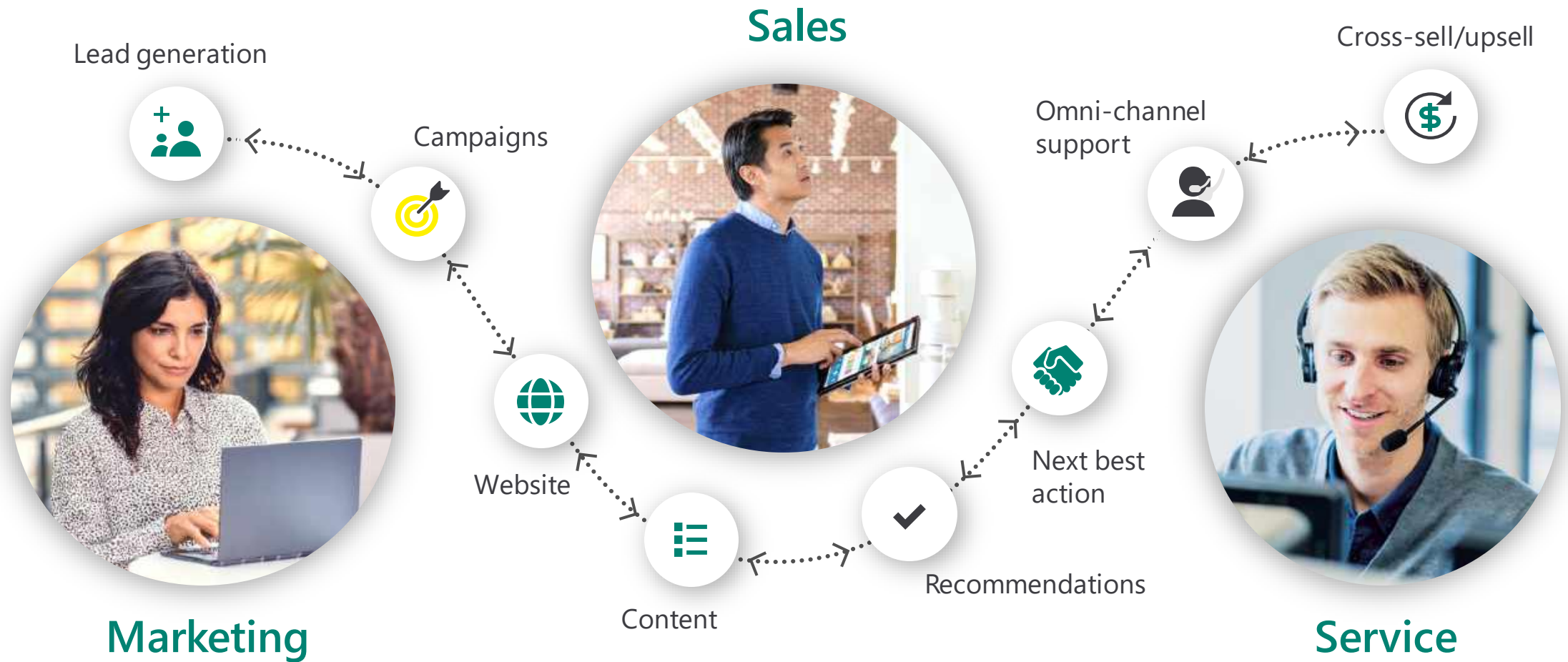
The screenshot shows the 'Customer Insights' interface with the 'Enrich profiles' configuration page. The page title is 'Enrich profiles' and it includes the instruction: 'Include the level of customer interest for a brand or category in your profiles.' The configuration is divided into two main sections: 'Demographics' and 'Brands and categories'. The 'Demographics' section requires selecting at least 2 profile attributes and includes dropdown menus for 'Date of birth', 'Gender', and 'Zip code (US only)'. The 'Brands and categories' section offers two options: 'Choose on my own' (selected) and 'Industry's top brands and categories'. Under 'Choose on my own', there are input fields for 'Brands' (0 / 5) and 'Categories' (0 / 5). Under 'Industry's top brands and categories', there is an 'Industry' input field.



# Customer Insights Use Case & Architecture Overview



# Power end-to-end customer experiences



# Marketing: Campaigns

## Use-cases

1. Run multi-channel campaigns based on historical order data
2. Target customers based on lifetime value or order value in the last half year

## How can CI help

1. Gather order data
2. Calculate lifetime value
3. Create different segments
4. Integration with Marketing Automation



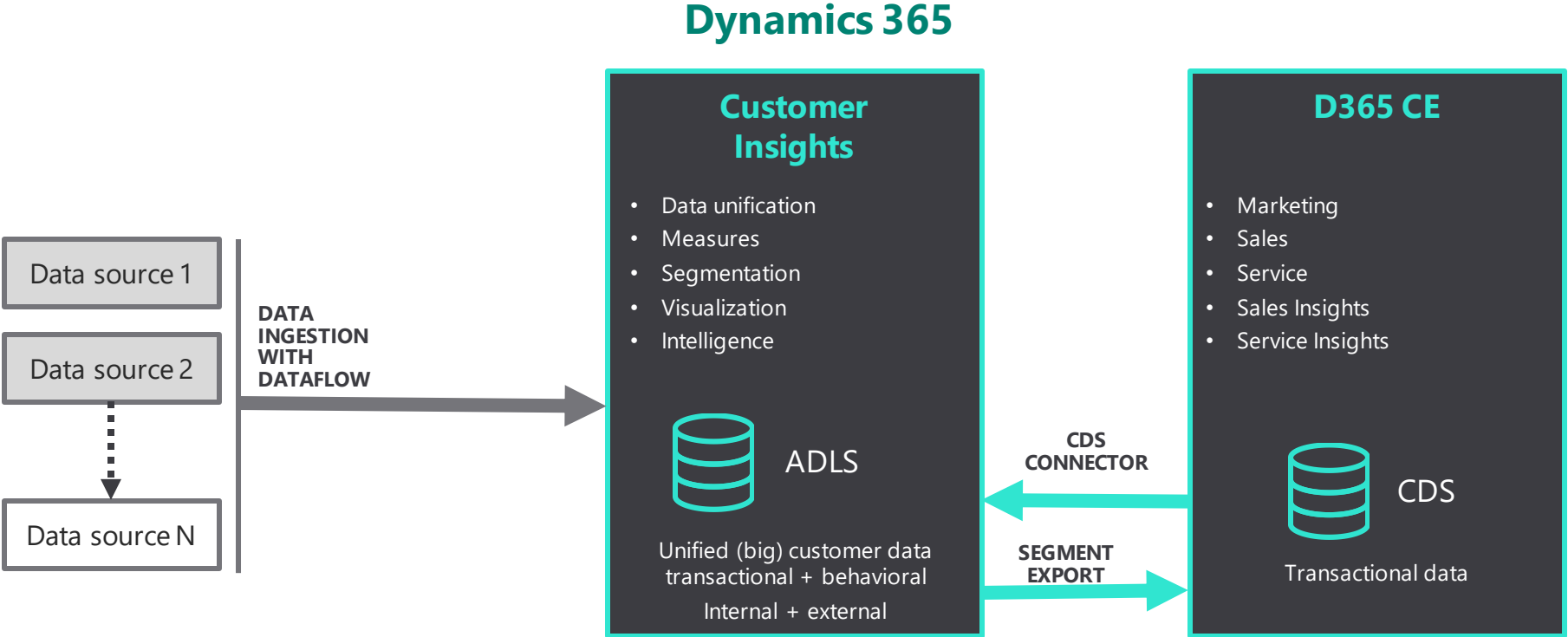
# Marketing: Campaigns

The screenshot displays the Dynamics 365 Marketing interface for a segment named 'HighScoreCustomers'. The breadcrumb navigation at the top reads 'Marketing > Segments > HighScoreCustomers'. The main header area includes the segment name 'HighScoreCustomers' and its details: 'HighScoreCustomers' (Name), 'Static segment' (Segment type), and 'Going live' (Status release). Below this, there are tabs for 'Definition', 'General', and 'Related', with 'General' being the active tab. The main content area is a list of key-value pairs for the segment's properties:

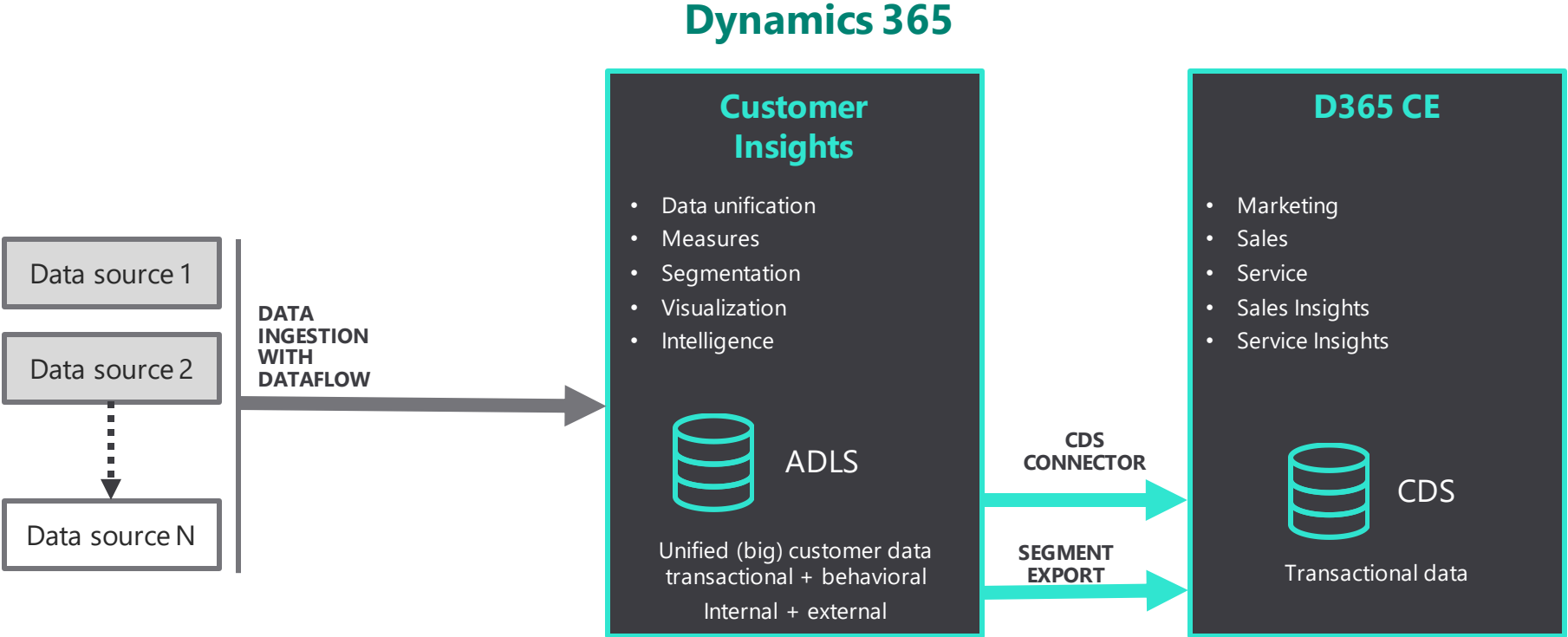
Name	HighScoreCustomers
Created on	9/23/2019 7:24 AM
Segment type	Static segment
External Source	Customer Insight
External Segment URL	<a href="https://dct-wus-01.ci.ai.dynamics.com/app/segments/insights/Test23c360?instanceId=49d164e9-861b-4346-9cab-f046731...">https://dct-wus-01.ci.ai.dynamics.com/app/segments/insights/Test23c360?instanceId=49d164e9-861b-4346-9cab-f046731...</a>
Activation status	Going live
Owner	Marketing Tip2
Description	Refreshed: 9/23/2019 7:35:03 AM



# Marketing: Campaigns



# Marketing: Campaigns



# Marketing: Website / Content

## Use-cases

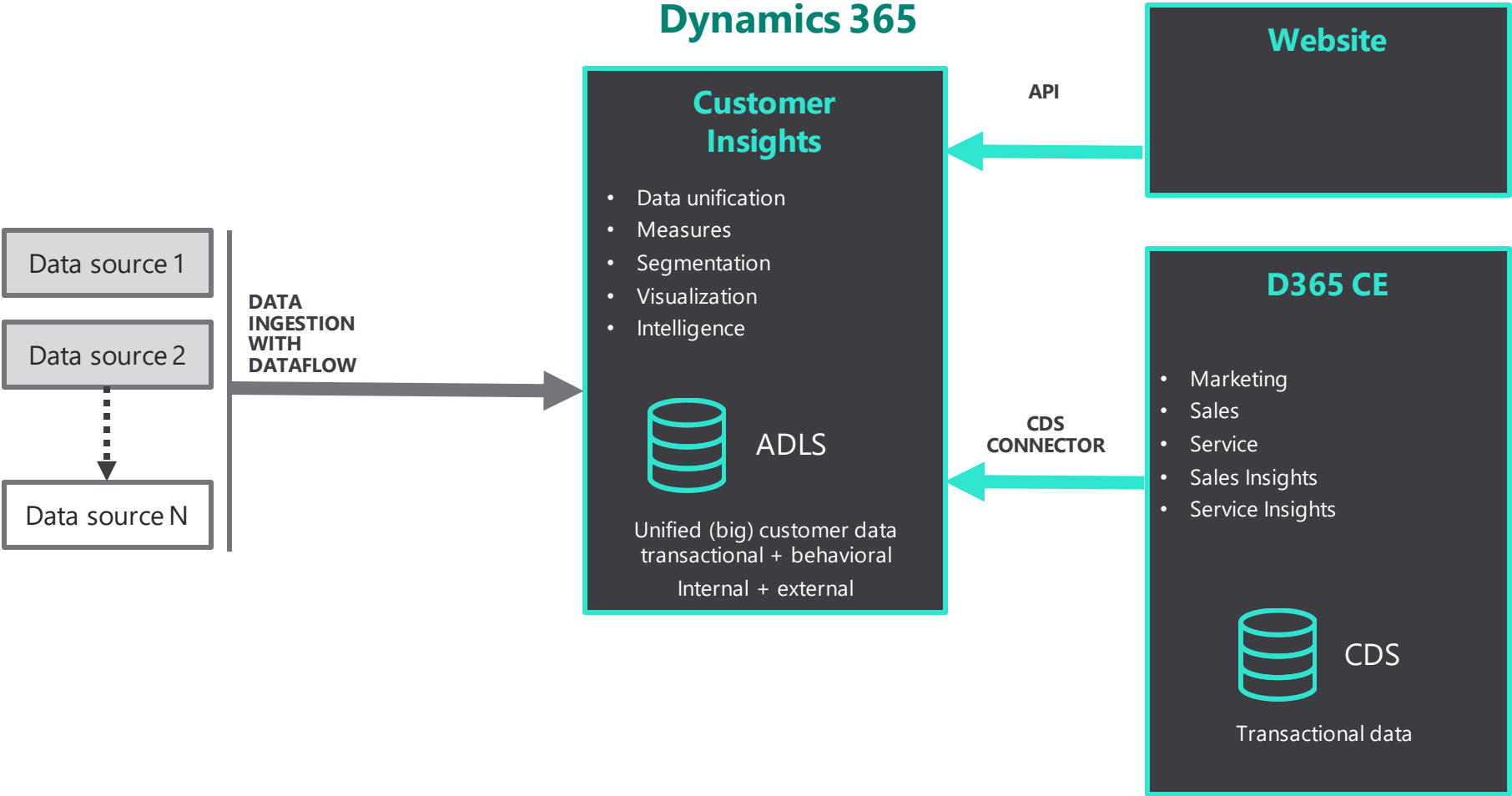
1. Based on lifetime value or historical orders show different content to a website visitor
2. Include service requests

## How can CI help

1. Gather order data & service requests
2. Calculate lifetime value
3. Create different segments
4. API integration
5. Personalize website content



# Marketing: Website / Content





# Sales: 360-degree profile

## Use-cases

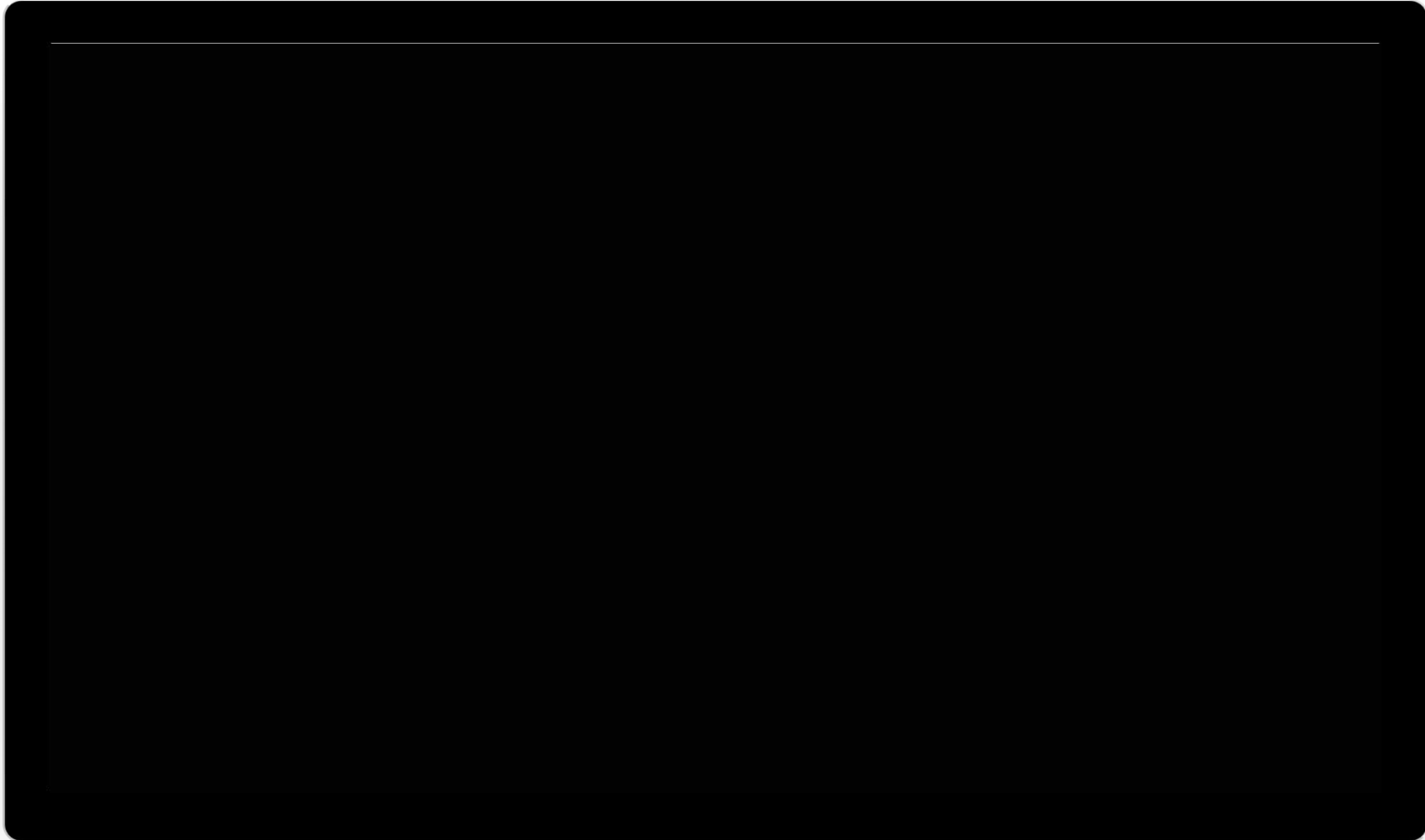
1. Insights in all touchpoints & interactions
2. Insights in lifetime value, churn rate

## How can CI help

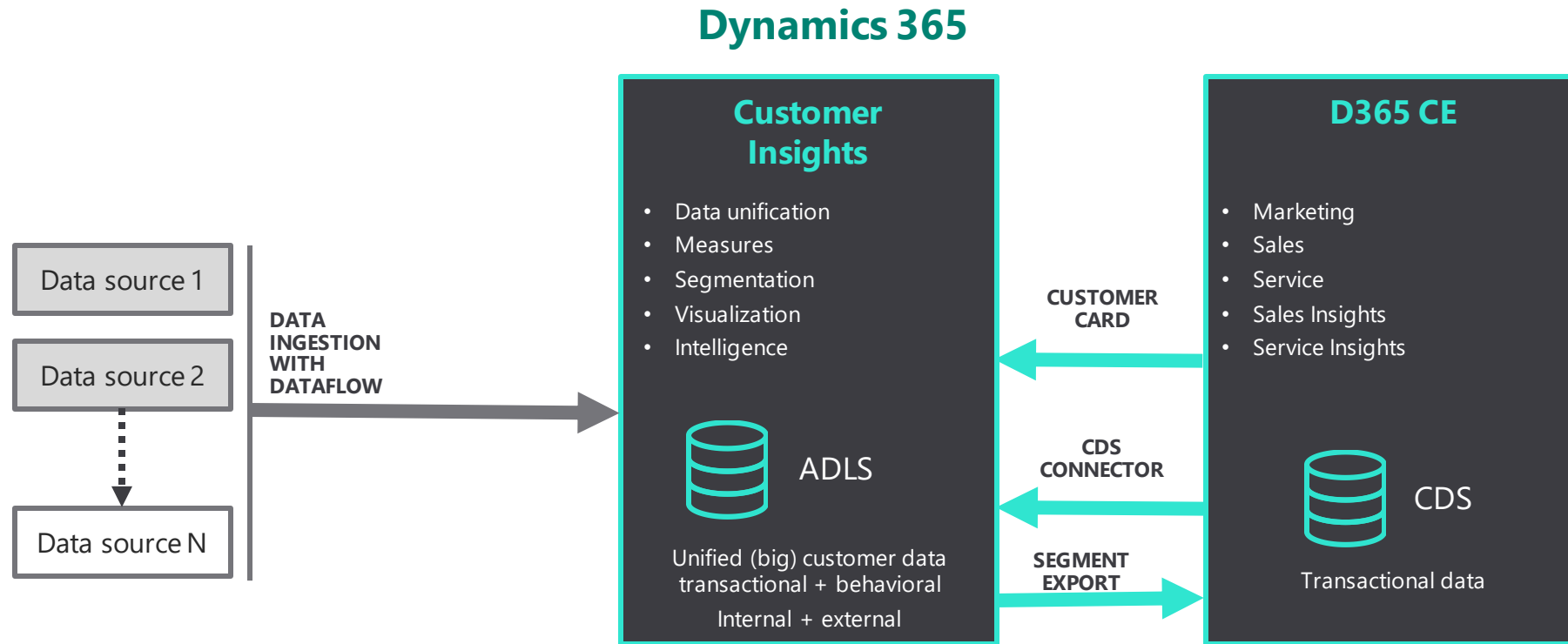
1. Gather all relevant data
2. Calculate measures
3. Customer Cards in Dynamics 365



# Sales: 360-degree profile



# Sales: 360-degree profile



# Sales: store

## Use-cases

1. Insights in all touchpoints & interactions
2. Insights in lifetime value, churn rate

## How can CI help

1. Gather all relevant data
2. Calculate measures
3. Power App

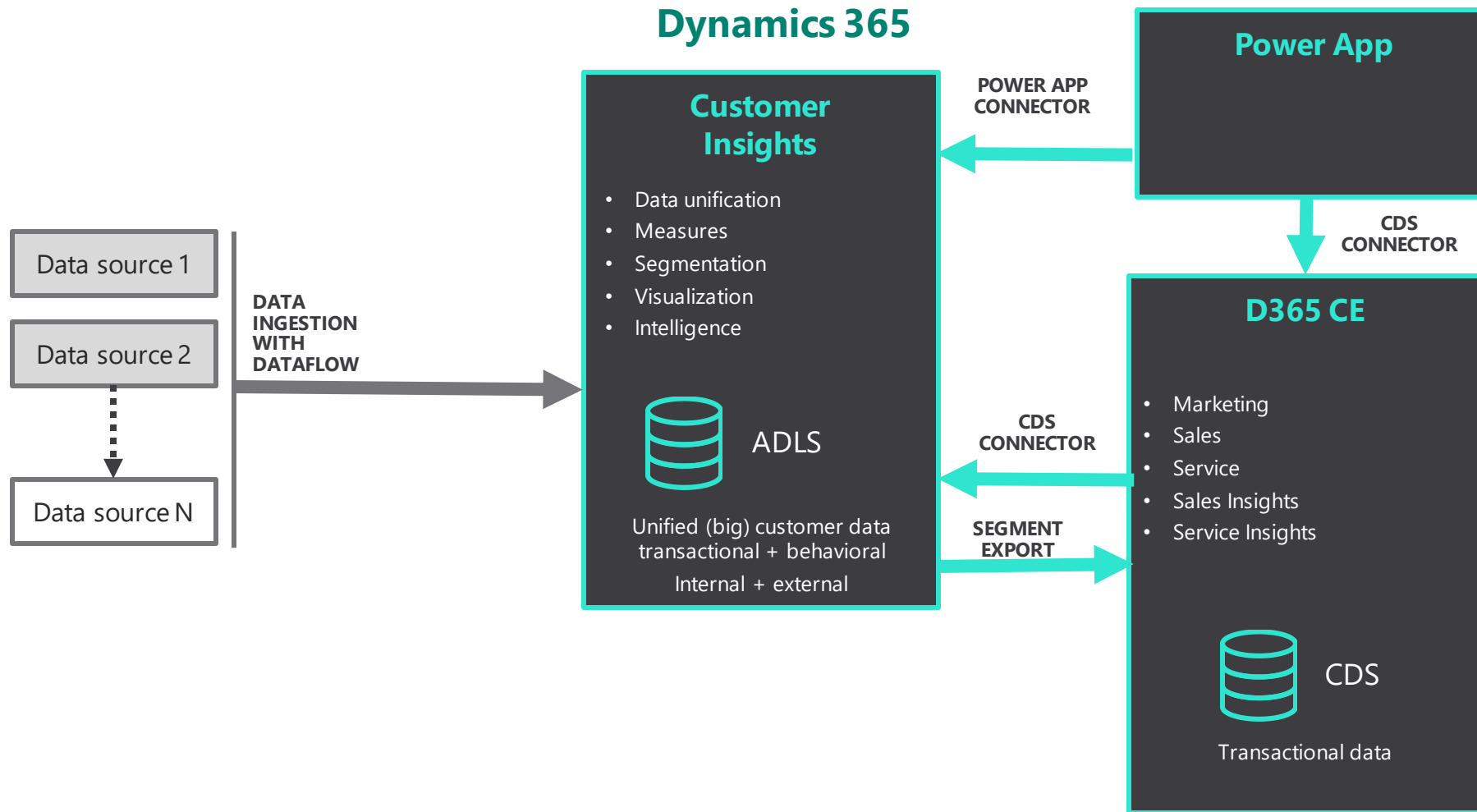




# Sales: store



# Sales: store



# Service: personalization

## Use-cases

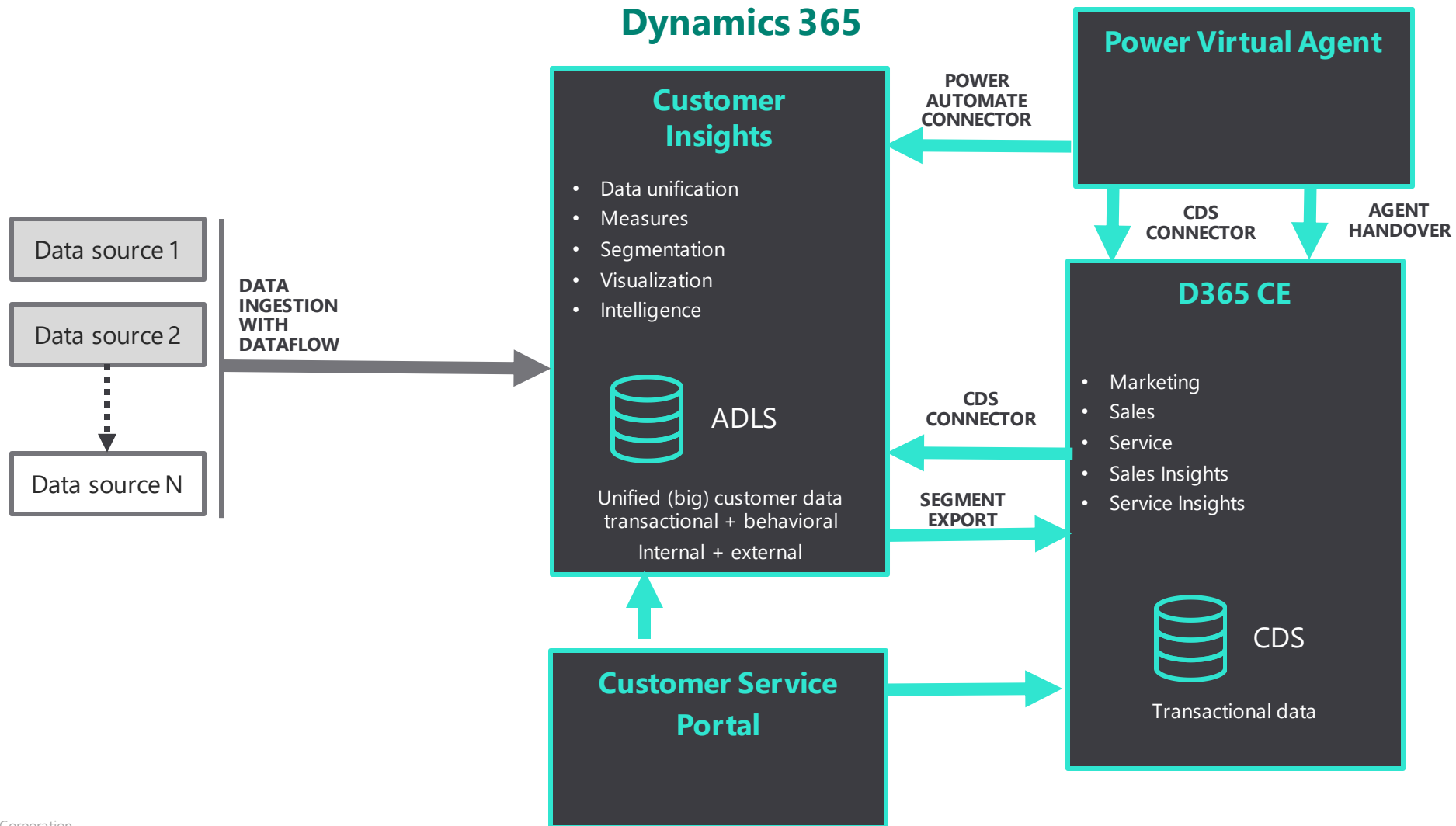
1. Service Agents has a 360-degree customer profile
2. Previous order data, service request, knowledge base search and usage history powers chat bots

## How can AI help

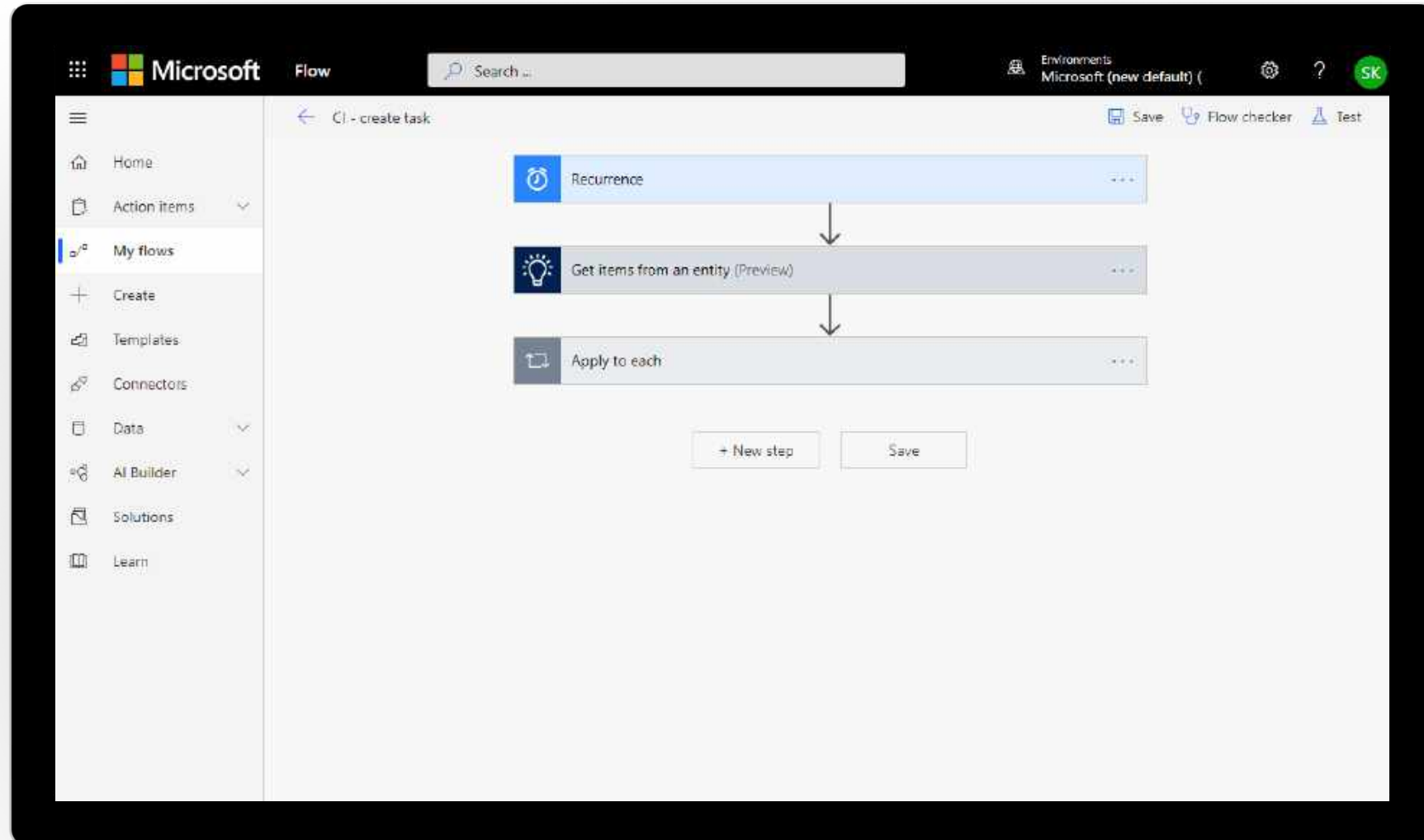
1. Gather all relevant data
2. Customer Cards in Dynamics 365
3. Dynamics 365 Customer Service (Omnichannel)
4. Power Virtual Agent



# Service: personalization



# Power Automate






## Other possible use case

1. Loyalty offers based on measures
2. Use Facebook advertising based on CI segment
3. Predict customer intent based on the customer profile



# Power BI

**CUSTOMER PROFILE**
Ask a question
←



**Niels Snabe**  
Marketing manager  
Customer since 8/2013  
Last purchase: 1/29/19

---

Gender: Male

---

Family Status: Married

---

Address: Ben Websters Vej 4,2, tv  
København SV 2450 Danmark

**AWARENESS**

6 Activities  
3 Social Activities  
2 Phone Calls

[View More](#)

**ENGAGEMENT**

2 Open Leads  
75% Qualification Rate  
70 Engagement Score

[View More](#)

**Timeline**

Activities (9)

4 Gardens 2 Promotion 2 Promotion...

---

BEFORE THIS MONTH Sort by date

- 🌐 Promotion Consumed - 7/27/18 "Free Royal Beer"
- 🌐 Promotion Consumed - 7/27/18 "Bring a friend for rock"
- 🌐 Gardens - 7/27/18 Event "A-ha concert"
- 🌐 Gardens - 5/10/18 Event "Company meeting"
- 🌐 Promotion - 5/7/18 "Bring a friend for rock"
- 🌐 Promotion - 5/7/18 "Free Royal Beer"

**FULFILLMENT**

\$6,600 Lifetime Spend  
\$2,200 Last Purchase Amount  
\$850 In-Process Sales


[View More](#)

**SUPPORT**

0.40 Churn Score  
1 High Priority Cases  
2 Active Cases

[View More](#)

**DATA SOURCES AND SEGMENTATION**



**INTERESTS**

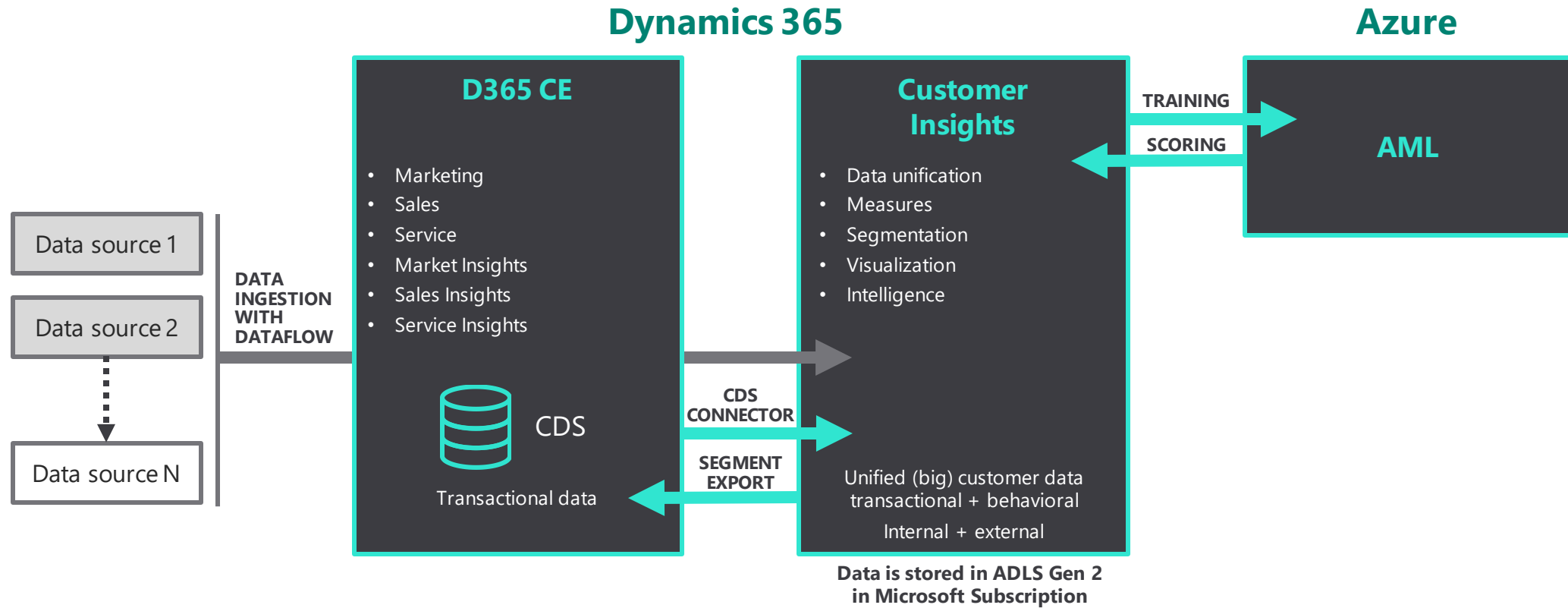
Similar Profiles

- Movies & Films
- Wedding Planning
- Personalized Gifts
- Party Supplies
- Gifts & Occasions
- Gift Baskets

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Dynamics 365

# AI & Machine Learning






## Chipotle serves up inviting experiences

- Better understand known and unknown guests across in-store and online channels
- Uniquely enrich customer profiles with Microsoft's proprietary signals and 3<sup>rd</sup> party data sources
- Activate insights to drive personalized loyalty offers and digital ads across multiple destinations including Facebook.



MEXICAN GRILL





“Customer Insights is a way for us to be able to handle all the touch points we have with customers, and it’ll help us get more customers, keep the customers we have, and keep them more satisfied.”

James Petersen

Chief Operating Officer & President of Retail Services

## AEP Energy lights up personalized experiences

- Gain a 360-degree view of all customers - individuals and businesses
- Identify upsell/cross-sell opportunities for existing customers by using intelligent segmentation
- Empower marketing, sales, and service professionals to deliver consistent 1:1 personalized experiences



An **AEP** Company





## Review & Next Steps



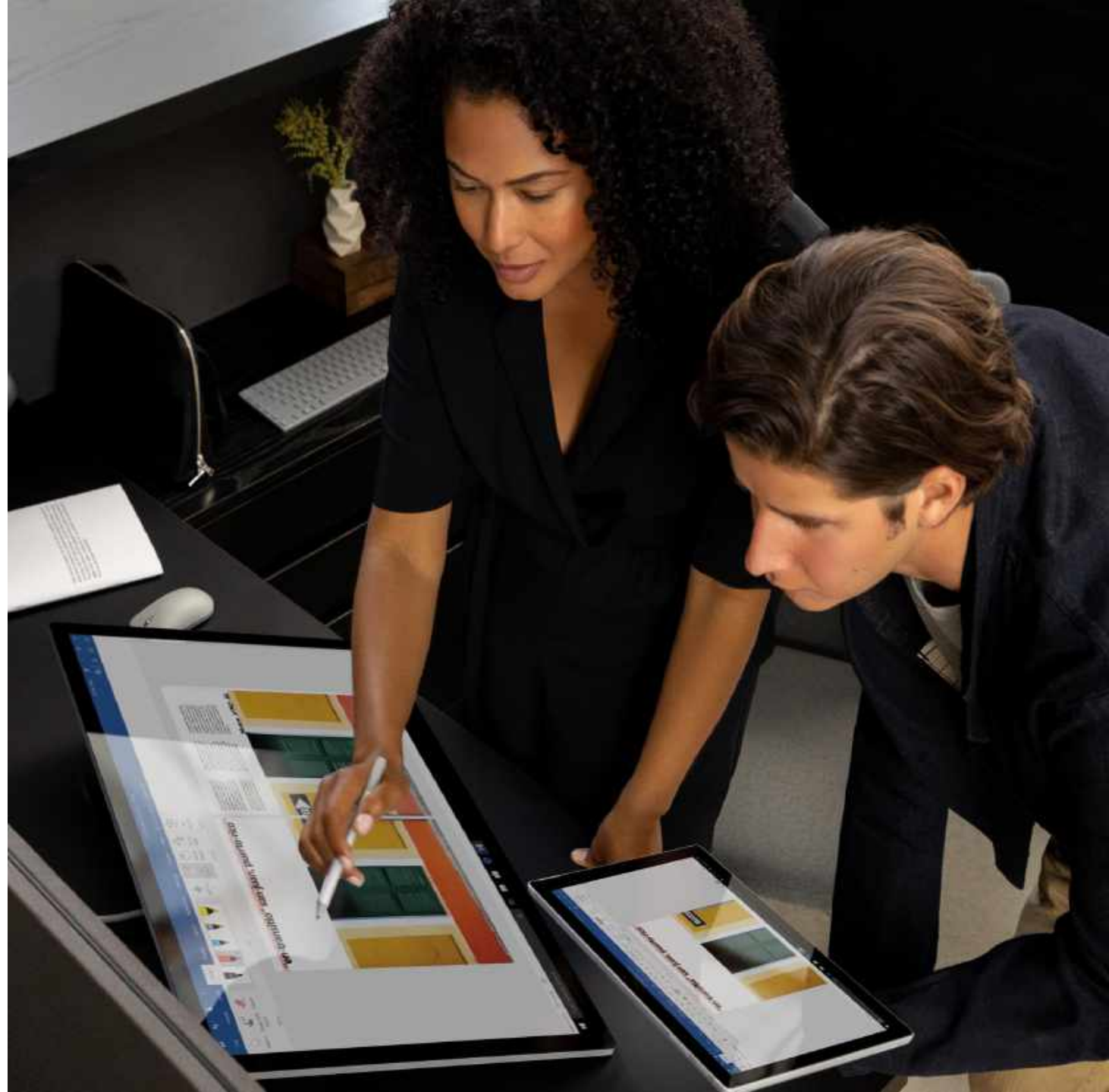
# Review



- Did the workshop give a good idea of what CI can do?*
- What were your goals and/or questions for today?*
- Were your goals and/or questions answered?*

# Next Steps

- Workshop or pilot with your data
- Envisioning workshop



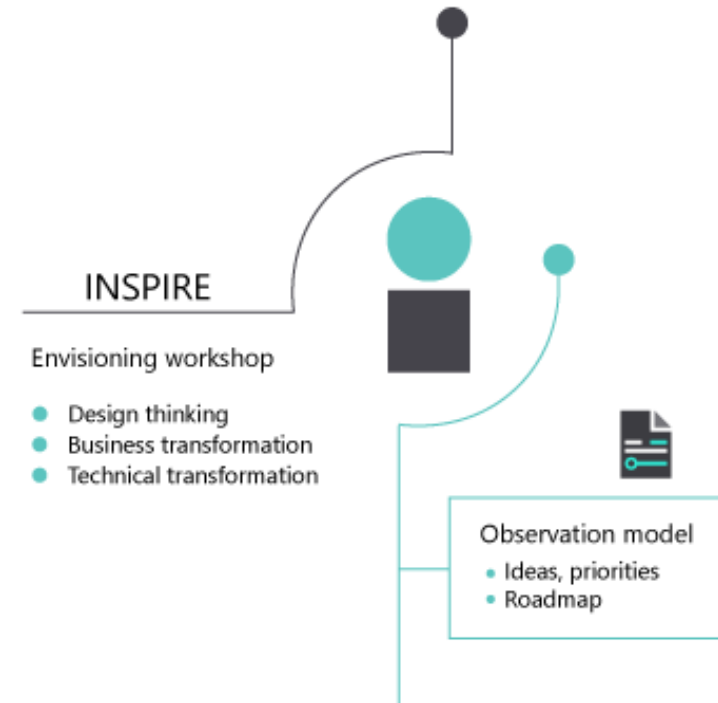
## Workshop or pilot

- Same format as today but focusing on your own dataset
- Number and complexity of data sources determines costs
- 2-day starters package (includes determining goals, analysis data sources, segments and measures)



# Envisioning Workshop

- Customer Insights part of Digital Transformation, but where to start?
- Workshop first step of the Catalyst process, with a focus on creating a business transformation plan
- Envisioning workshop helps to design and prioritize solutions for the transformation plan and solution roadmap
- 2 days workshop package (including workshop and report)
- Stakeholder involvement required





# Thank You!

Thank you for taking part in Customer Insights in a Day.

Your feedback is important, please help us to refine content for future events.

If you have any feedback or suggestions relating to Customer Insights in a Day content, please let us know

<http://aka.ms/CIADFeedback>

