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CUSTOMER ENGAGEMENT ENGINEERS

25-06-2020

Dynamics 365 Customer Insights

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Microsoft

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Chief Technical Officer
BusinessBase

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Agenda

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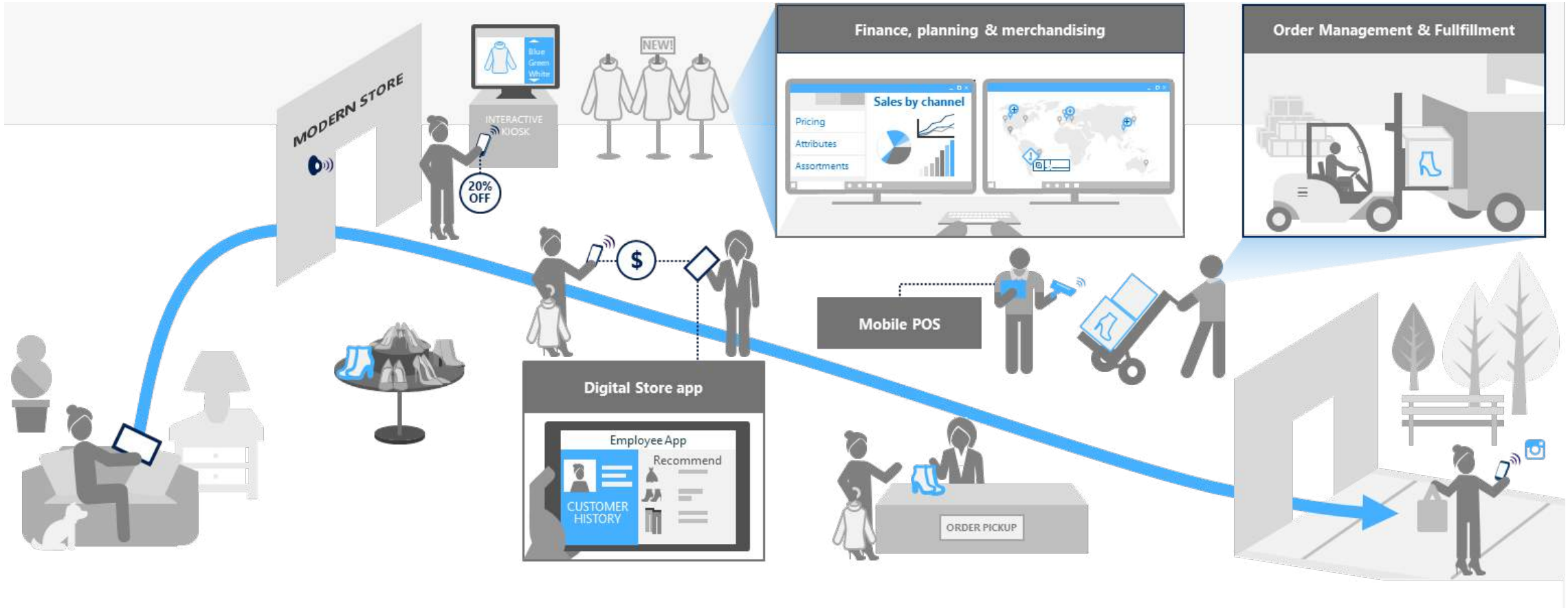
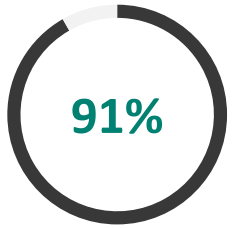
Customer data is everywhere

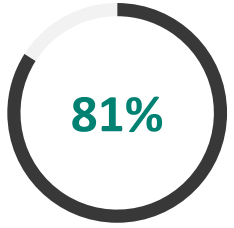
Customer touchpoints – Retail example



Customer expectations are growing



of consumers are more likely to shop with brands who recognize, remember, and provide relevant offers and recommendations. [1]



of buyers want brands to get to know them and understand when to approach them and when not to. [2]

[1] Accenture
[2] Accenture

Today’s experiences are falling short

65%

of consumers are frustrated by inconsistent experiences across channels. [1]

74%

of customers are frustrated by the irrelevant content they are exposed to on websites. Up to 40% of them will leave. [2]

61%

of customers stopped doing business with at least one company last year because of poor customer experience. [3]

[1] McKinsey
[2] Accenture
[3] Accenture

Managing customer data – not a new challenge, but increasingly more difficult

Disconnected customer data

Only 13%

Of organizations claim a high degree of making the most of available customer data

Inability to unify data

63%

Of organizations stated the top obstacle to using customer data is the inability to unify it

Lack means to extract data

47%

Of respondents cited inability to extract data from source systems as a key challenge

Understanding CDP users:
CDP Institute Member Survey, 2019 Published.

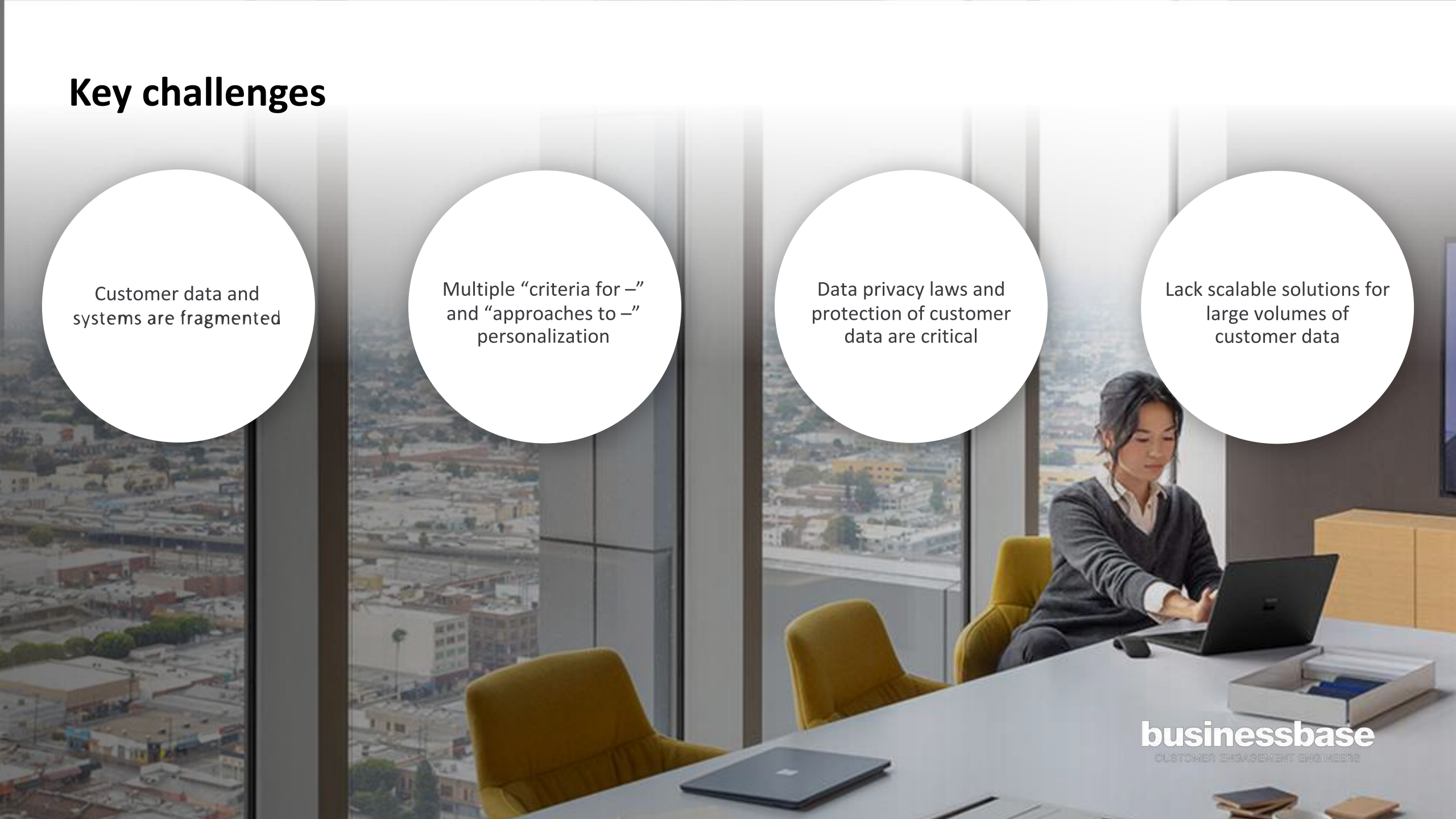
Key challenges

Customer data and systems are fragmented

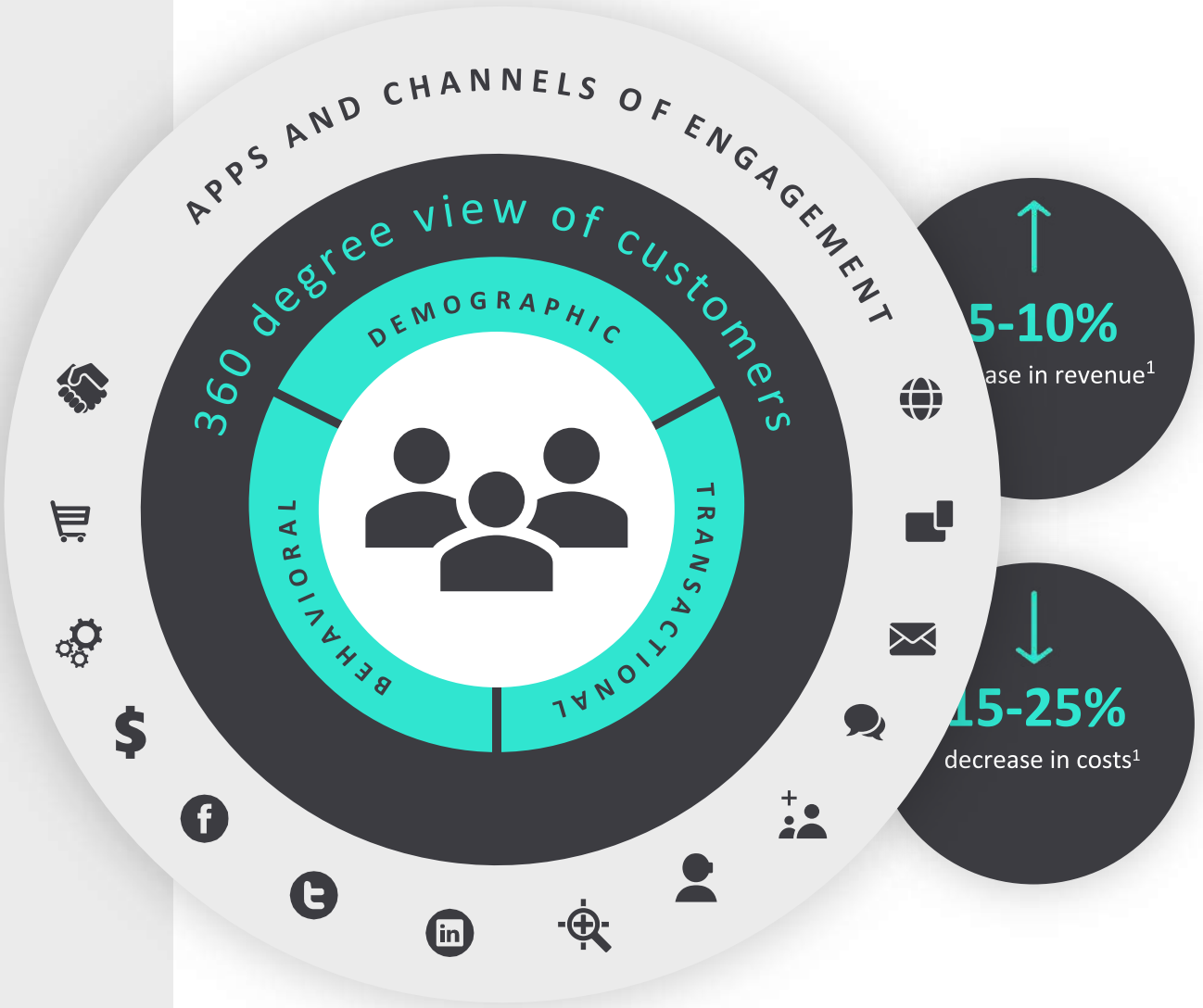
Multiple “criteria for –” and “approaches to –” personalization

Data privacy laws and protection of customer data are critical

Lack scalable solutions for large volumes of customer data



Close the gap by activating data to gain insights



[1] McKinsey

Customers

Patti Melendez

89 HIGH ENGAGEMENT

VP of IT at Fourth Coffee
New York, New York

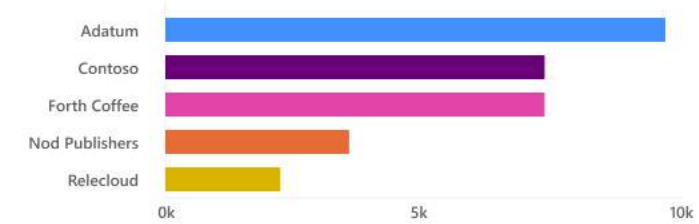
6 Interests

SPORTS TRAVEL SHOPPING +3

Insights

- Products used: Fabrikam dish machine
- Errors in last 28 days: 0
- Last contacted via email a month ago

Brands (similar generic predictive profile)



Churn risk

73.8%

+ Create segment + Create measure

Customer lifetime value

$15,000

+ Create segment + Create measure

Timeline

Activities (119) Filter

1 5 Purchase | 17 App | 7 Social | 19 Email

TODAY By date

Transaction from Sales - 1 min ago REAL TIME
New purchase at New York City store.

Email from Marketing - 8:20 PM
Opened email: "On sale now—our top picks are going fast at your favorite store location!"

YESTERDAY

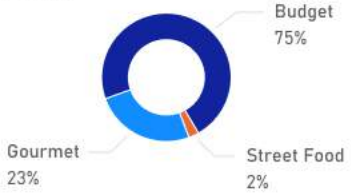
Social media mention - 11:47 AM
New post with a negative sentiment.

Average spending

$1,208

Food interests

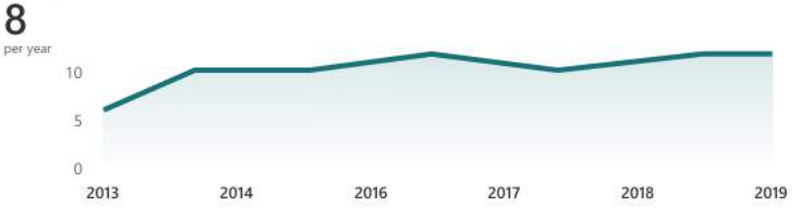
this month



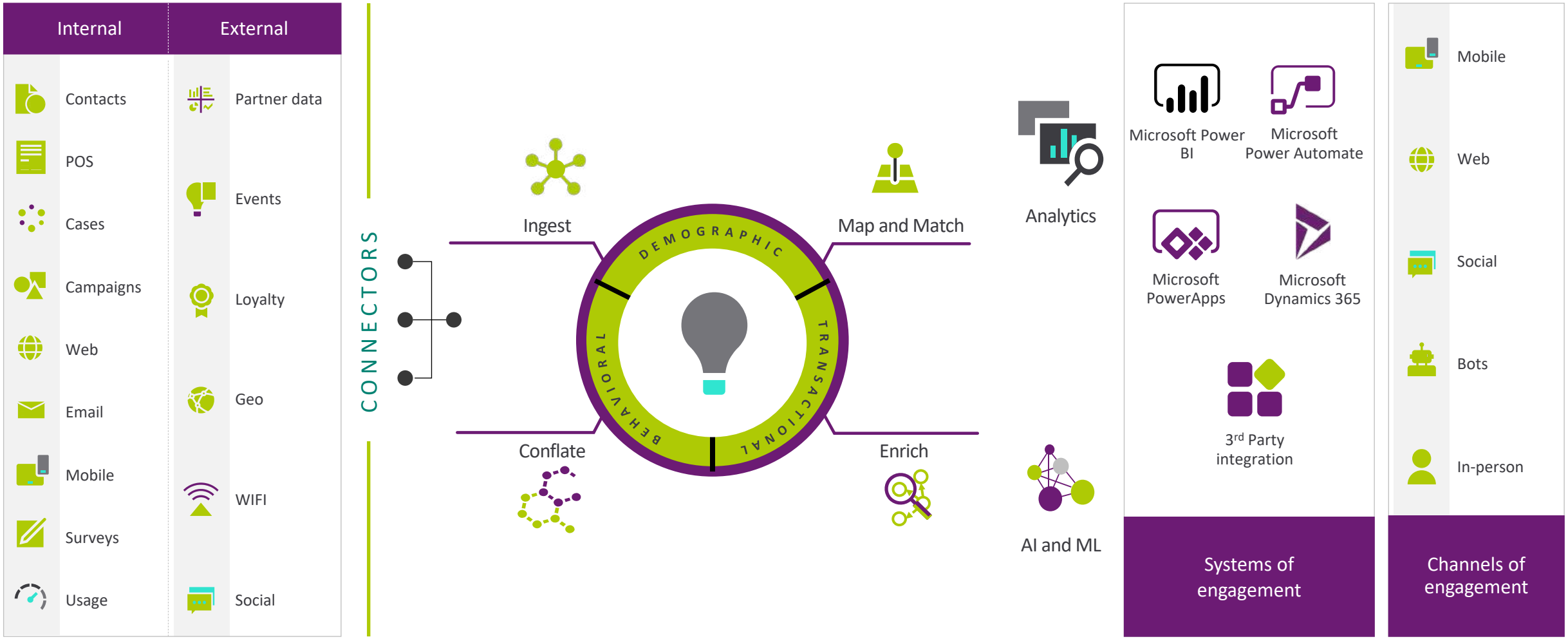
Engagement score

Average visits

8
per year



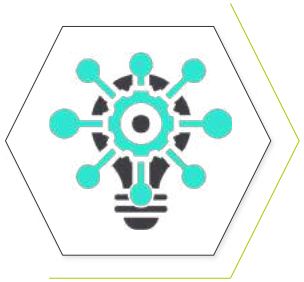
Our approach



Microsoft customer data platform

Get a complete view of customers

Combine and enrich all your data in real-time while empowering collaboration across everyone within your organization.



Unlock powerful insights with limitless analytics

Predict customer intent with out-of-the-box AI templates and apply custom machine learning models for deeper insights.

Drive meaningful actions with confidence

Harness data to drive informed decisions, personalize engagement across channels, and automate customer-centric experiences and processes.

Trusted platform with unmatched security and privacy

Customer Data Platform

What are the specifics?

- Centralized and unified customer profile from combined data sources
- No anonymous data
- Packaged Software
- Actionable data

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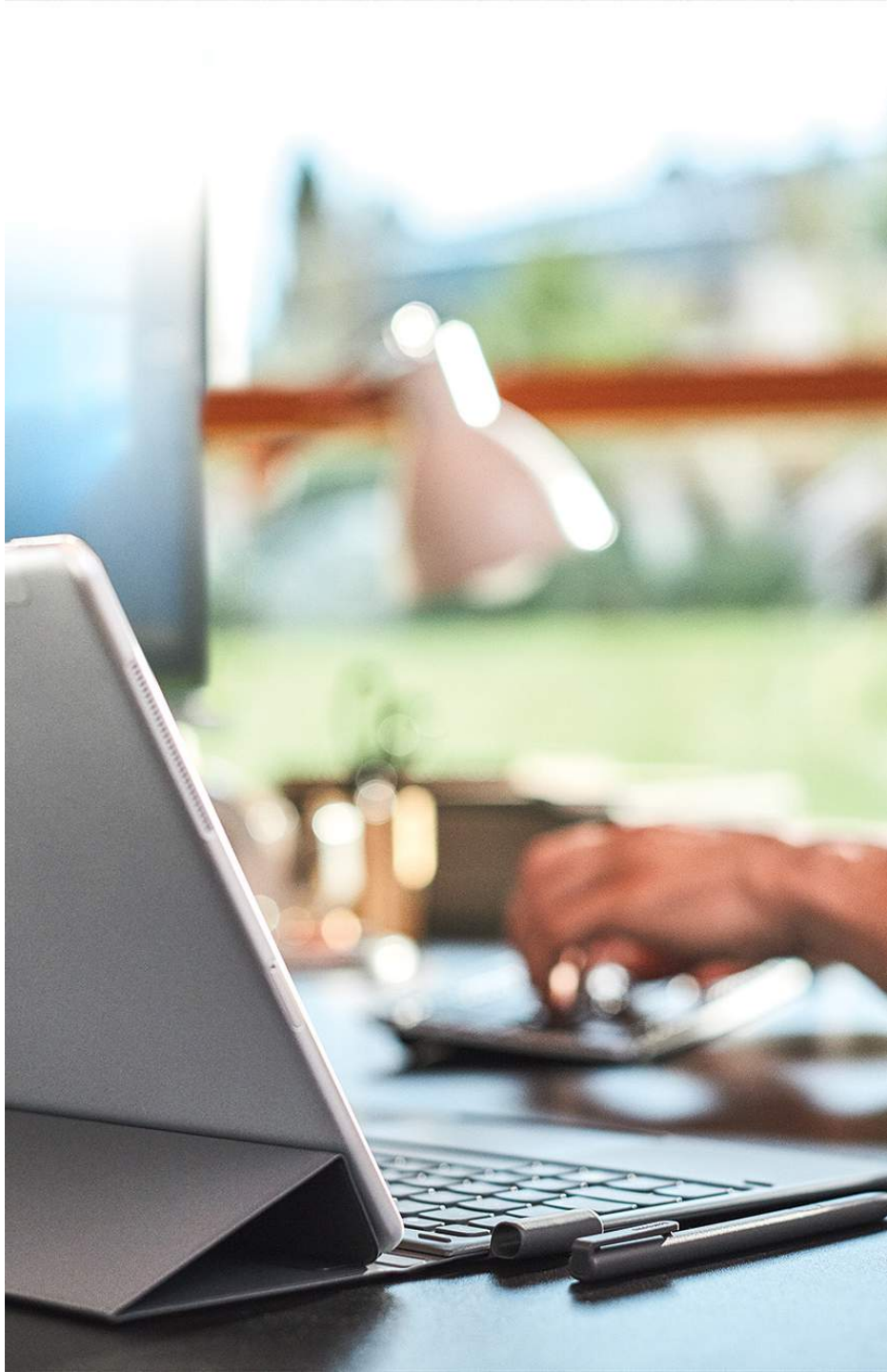
Customer Data Platform

What is it not?

- Not a Customer Relationship Management (CRM) system
- Not a Data Management Platform (DMP)
- Not an (Enterprise) Data Warehouse (DWH), analytics or visualization tool
- Not a personalization tool



Dynamics 365 Customer Insights

Mission & Vision

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

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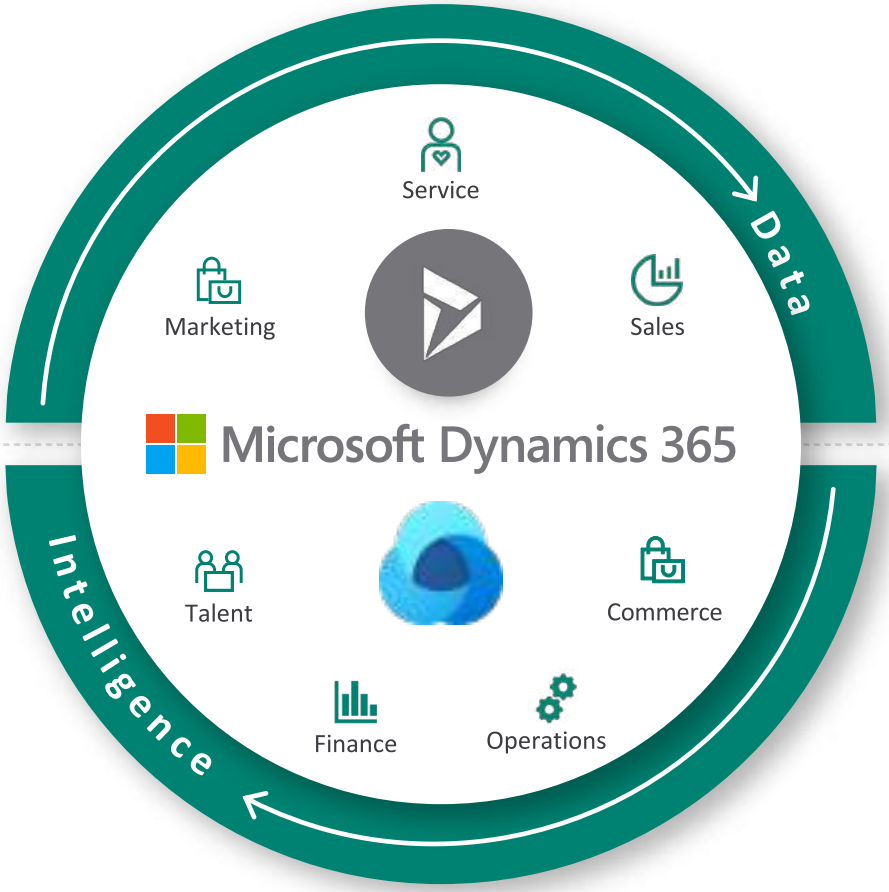
Modern

Unified



Intelligent

Adaptable

Power platform

Power BI
Business analytics

Power Apps
Application development

Power Automate
Process automation

Power Virtual Agents
Intelligent virtual agents

Microsoft Azure

Office 365

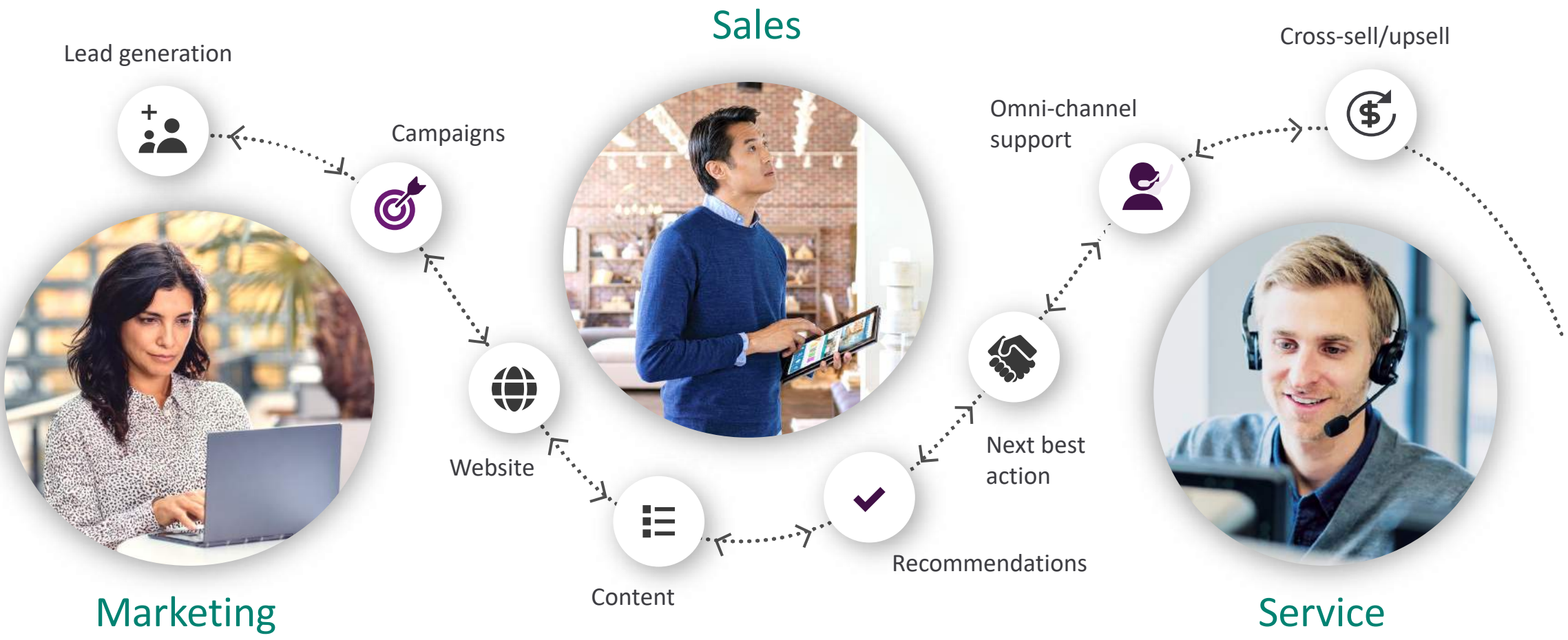
Bing

LinkedIn

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



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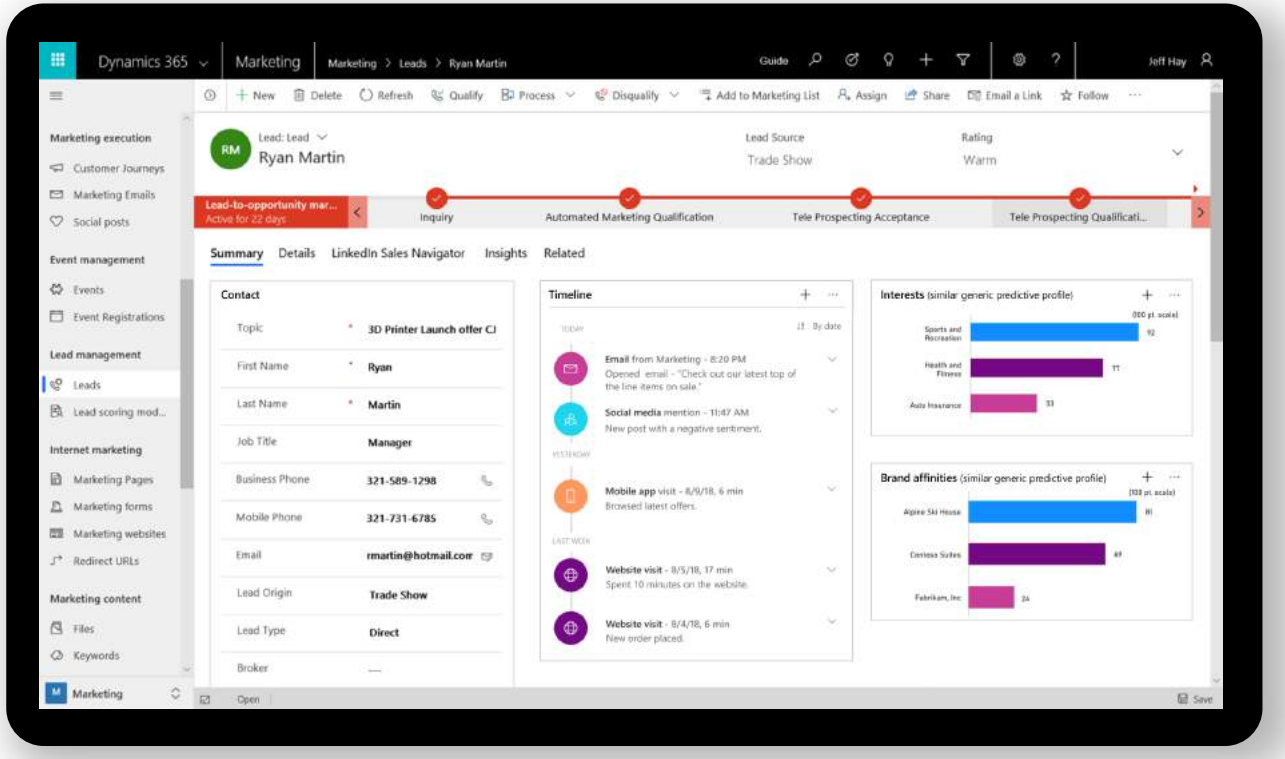
Use case powered by Customer Insights

- **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



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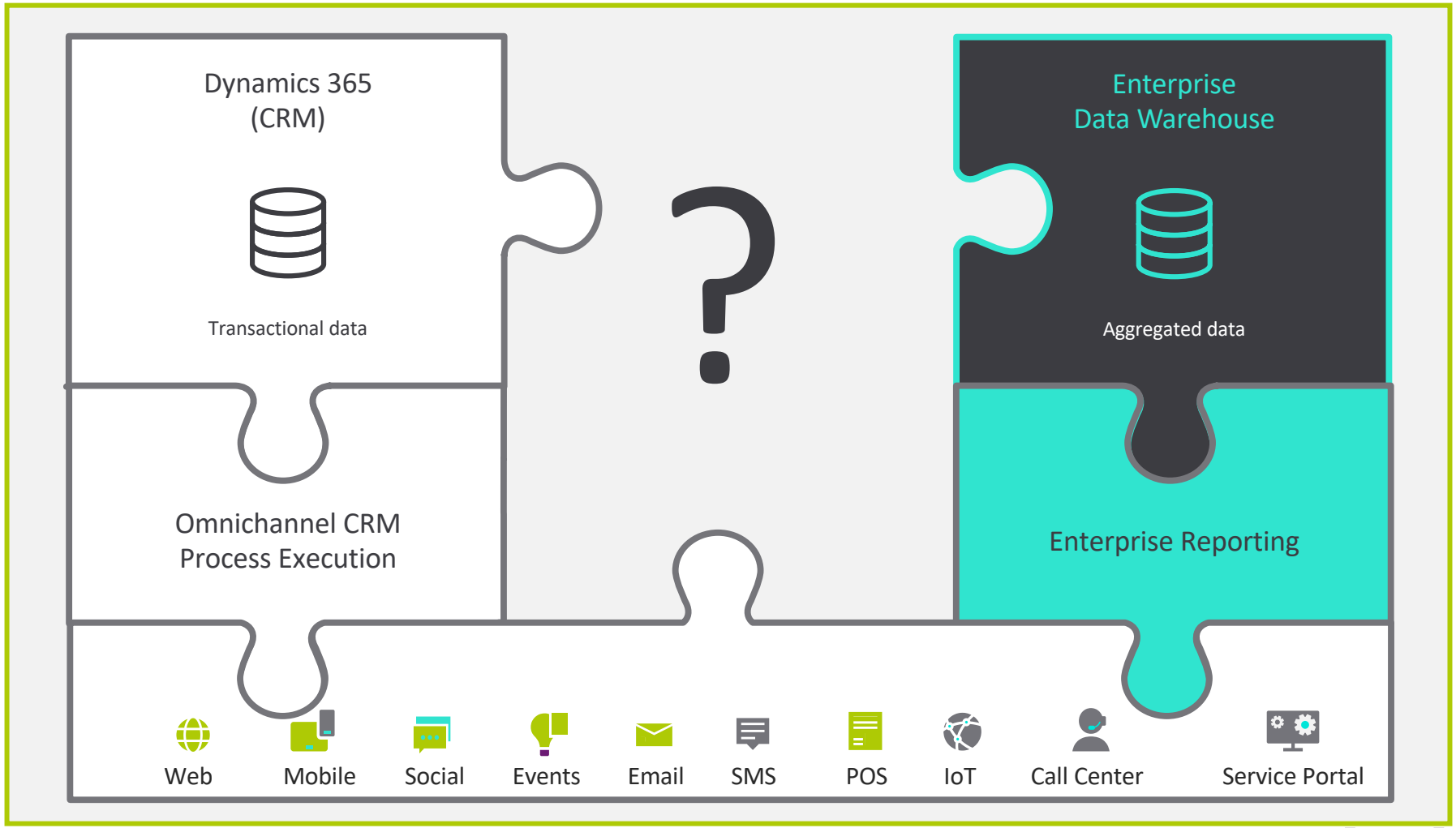
The current customer-engagement analytics landscape



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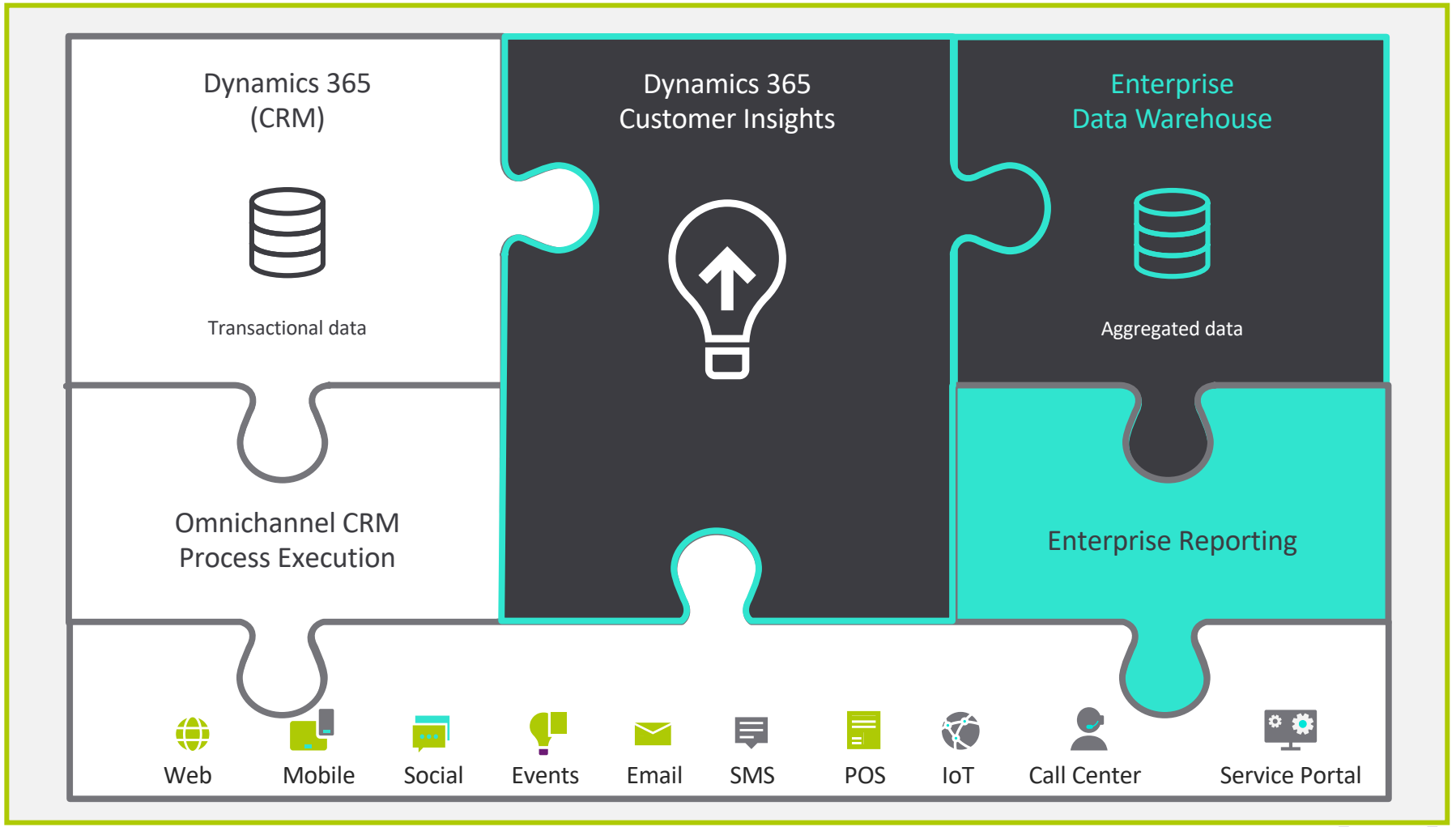
Evolving the customer-engagement analytics landscape



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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

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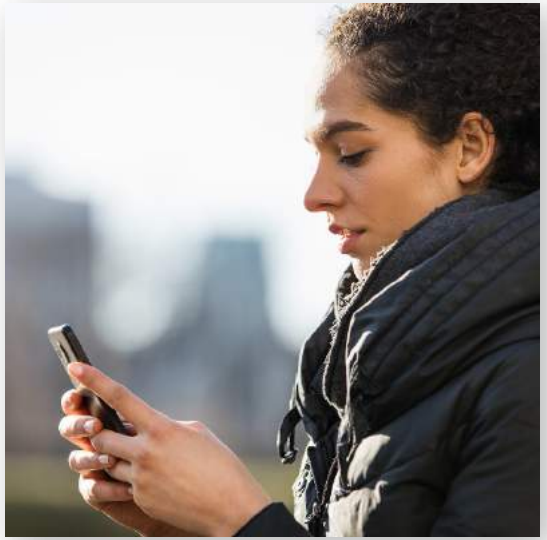
Customer Data: Modern sources

Demographic

Behavioral



Transactional

Proprietary

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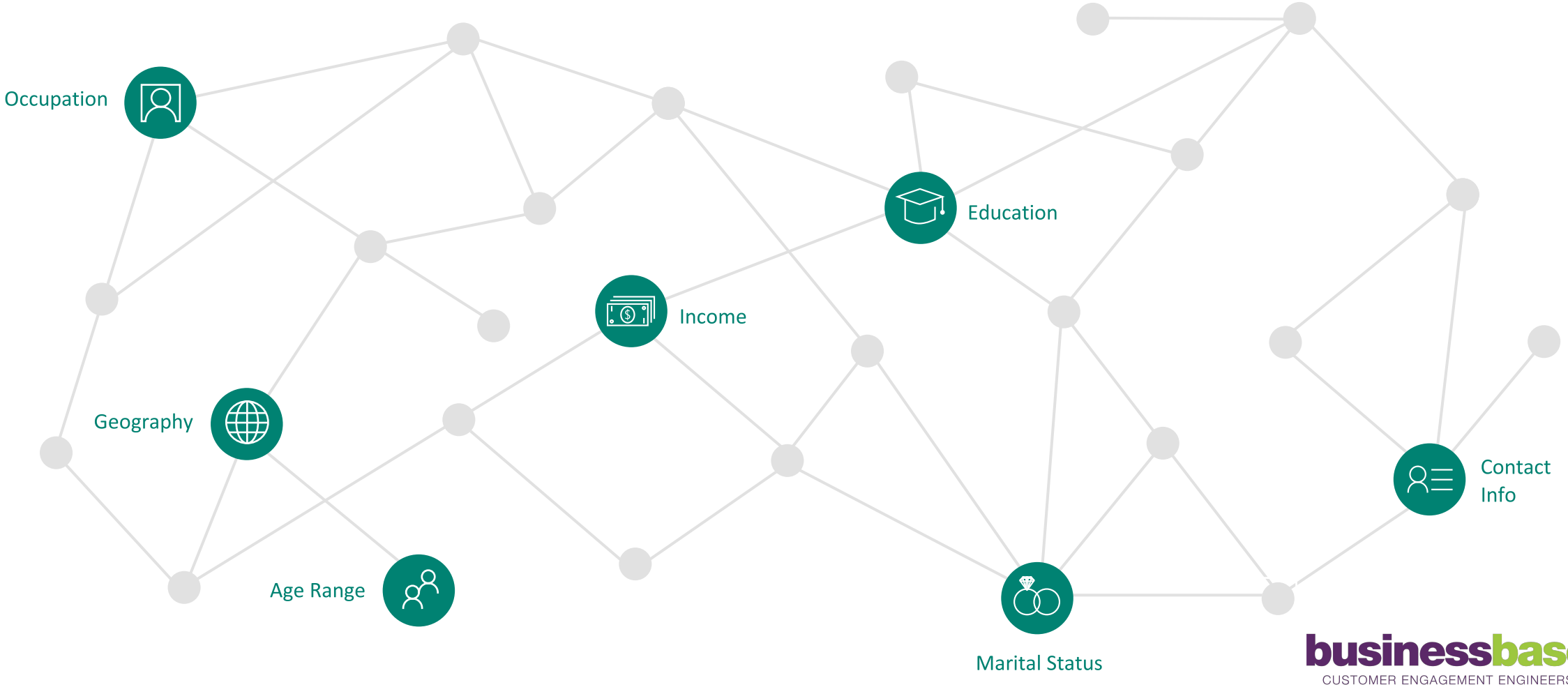
Customer Data points

Demographic



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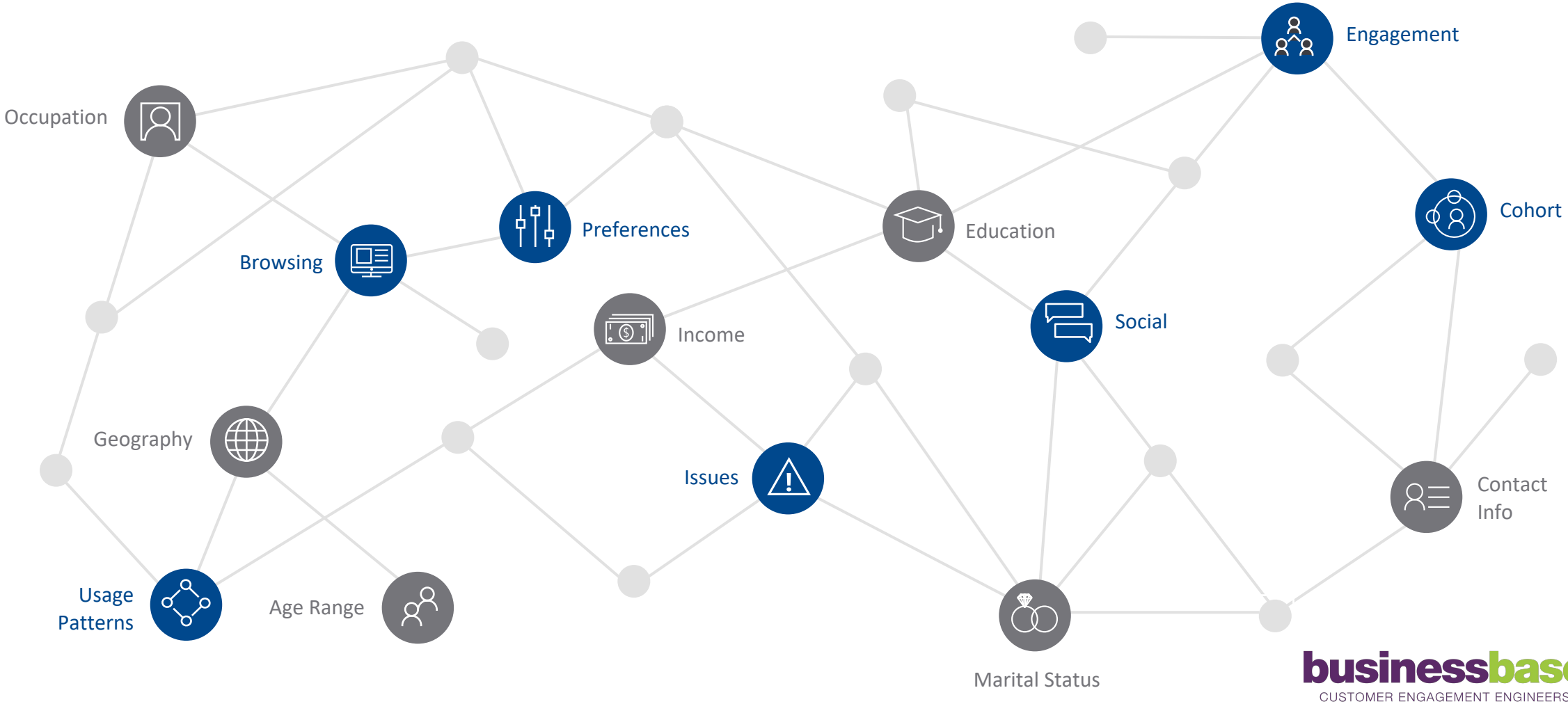
Customer Data points

Demographic + Behavioral



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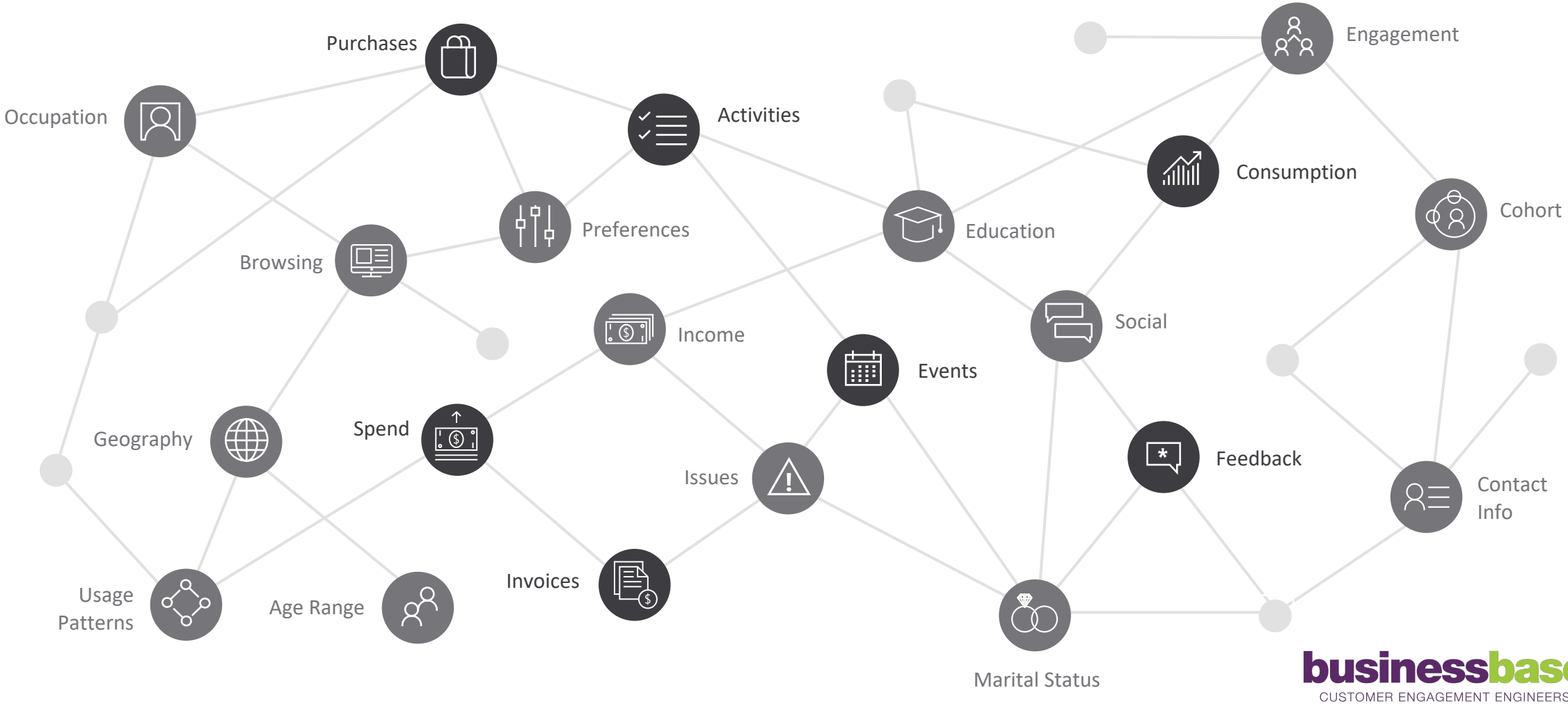
Customer Data points

Demographic + Behavioral + Transactional



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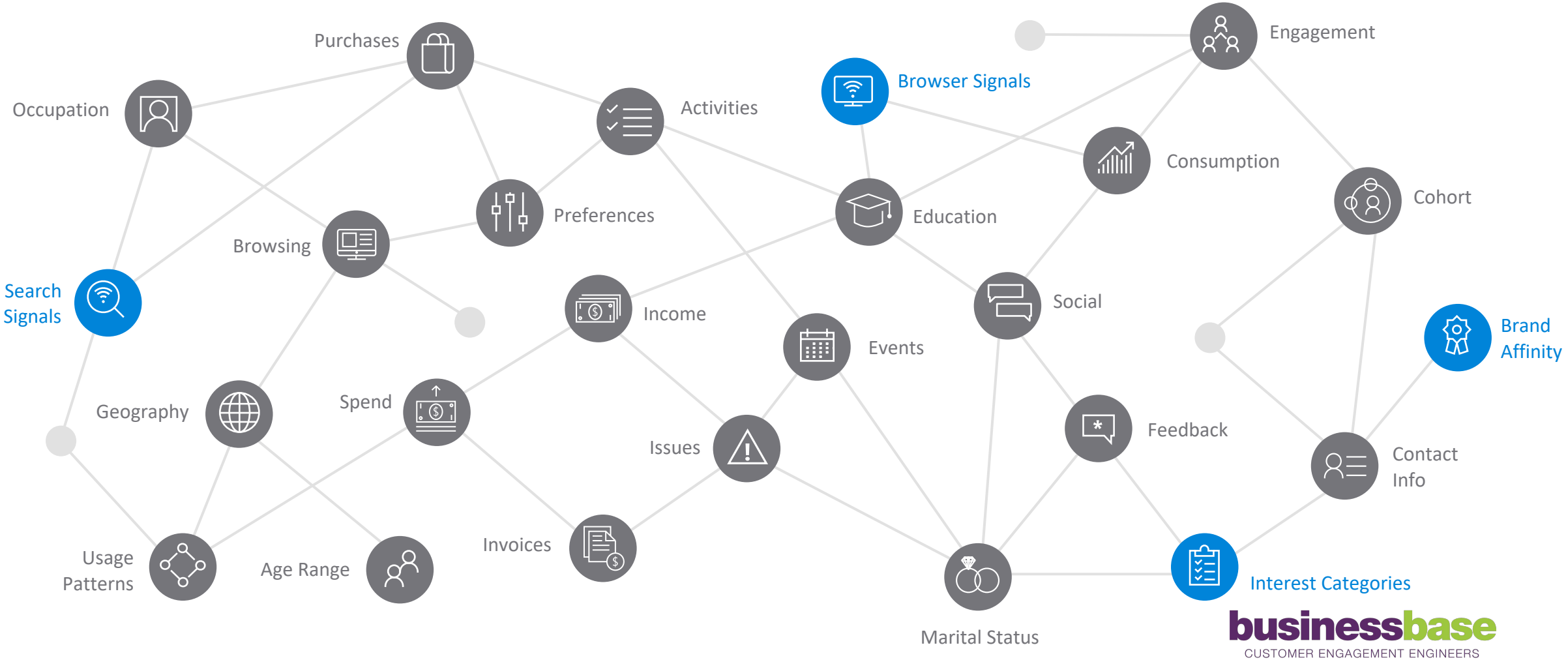
Customer Data points

Demographic + Behavioral + Transactional + Proprietary



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Key Phases

Ingestion

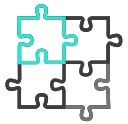
Bring customer and activity data from all sources

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

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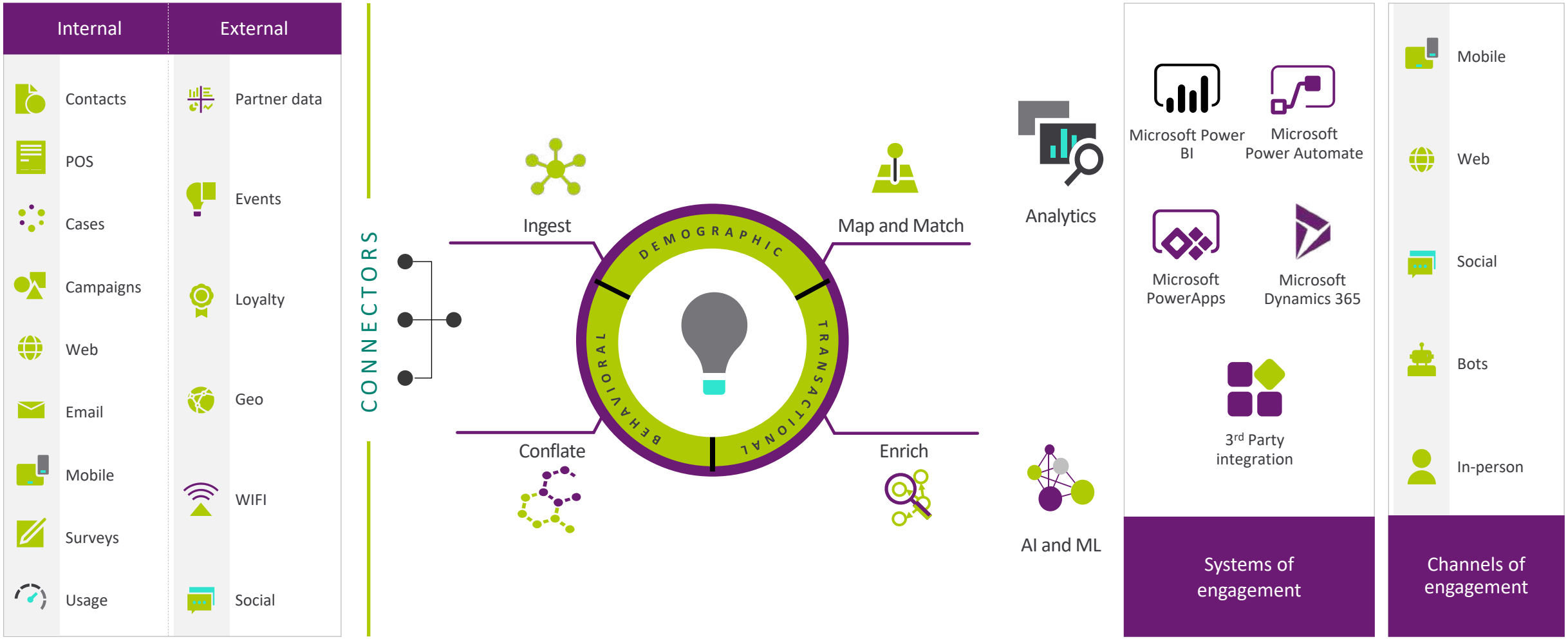
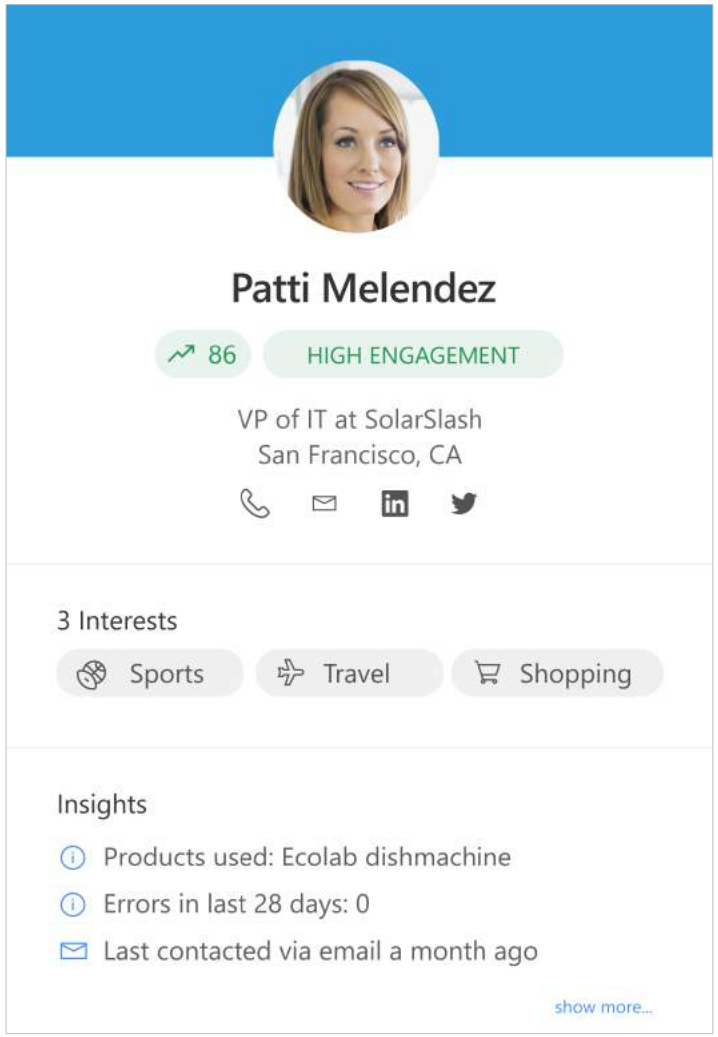
Our approach



Data-first comprehensive understanding of customer



Harness customer insights…

How do I provide a stellar personalized outcome?

Understand **market signals…**

How can I build and discover high value segments based on predictive demographic and audience intelligence?

Gather product insights…

How are my products and services being used and performing?

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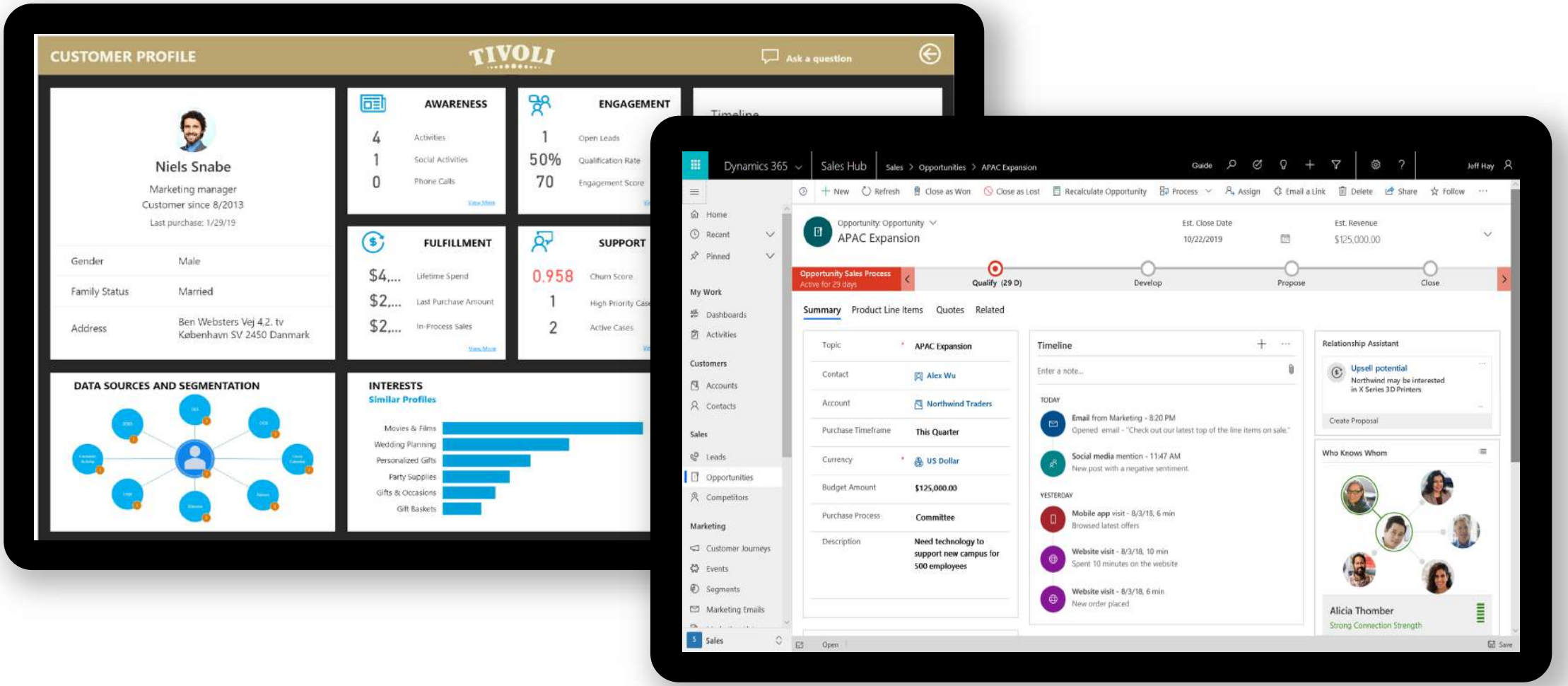
Customer cards & Dynamics 365 integration



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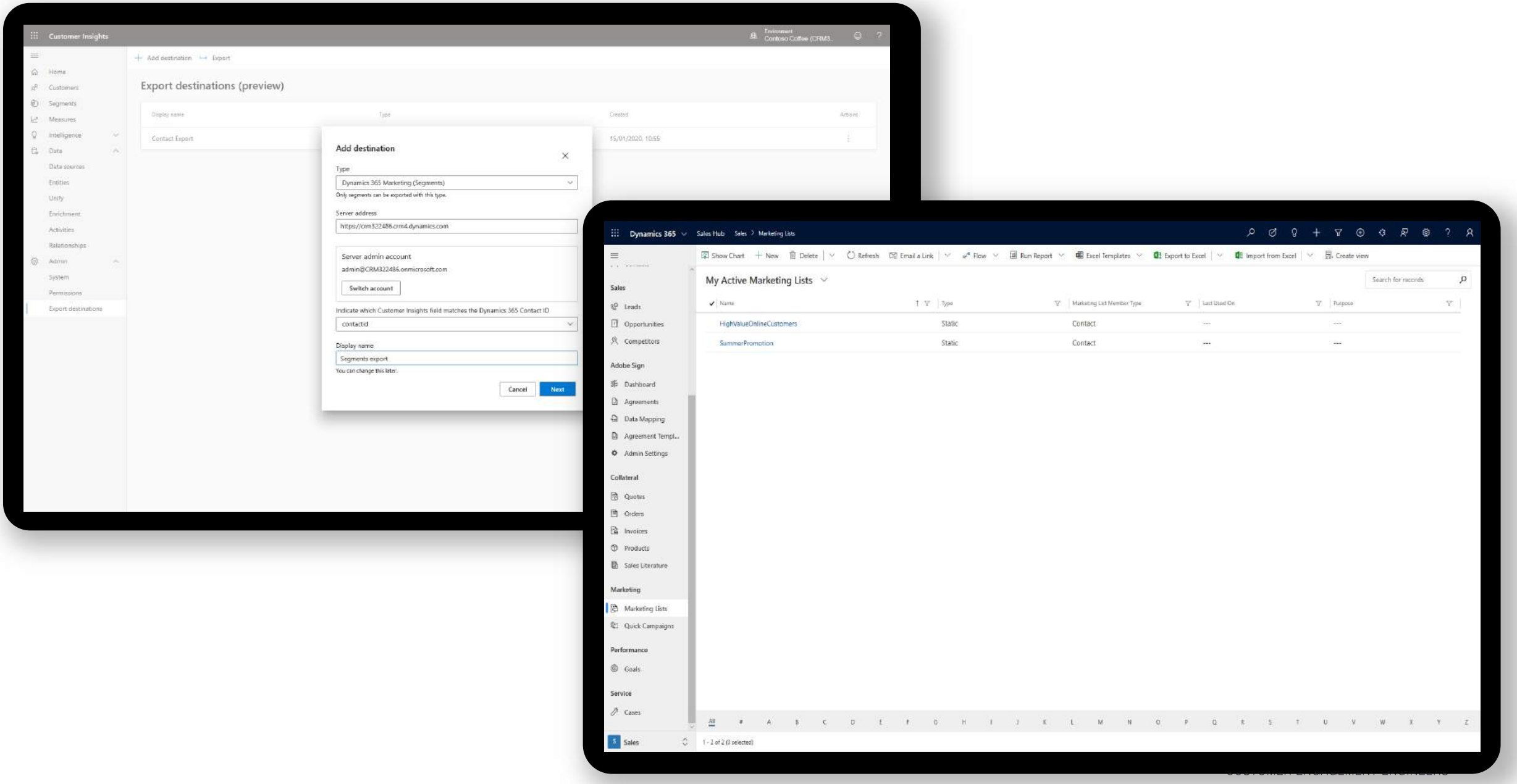
Customer Insights
Environment
Contoso Coffee (CRM3...
Add destination
Export
Home
Customers
Segments
Measures
Intelligence
Data
Data sources
Entities
Unify
Enrichment
Activities
Relationships
Admin
System
Permissions
Export destinations
Export destinations (preview)
Display name
Type
Created
Actions
Contact Export
15/01/2020, 10:55
Add destination
Type
Dynamics 365 Marketing (Segments)
Only segments can be exported with this type.
Server address
https://crm322486.crm4.dynamics.com
Server admin account
admin@CRM322486.onmicrosoft.com
Switch account
Indicate which Customer Insights field matches the Dynamics 365 Contact ID
contactid
Display name
Segments export
You can change this later.
Cancel
Next
Dynamics 365
Sales Hub
Sales
Marketing Lists
Show Chart
New
Delete
Refresh
Email a Link
Flow
Run Report
Excel Templates
Export to Excel
Import from Excel
Create view
Sales
Leads
Opportunities
Competitors
Adobe Sign
Dashboard
Agreements
Data Mapping
Agreement Templ...
Admin Settings
Collateral
Quotes
Orders
Invoices
Products
Sales Literature
Marketing
Marketing Lists
Quick Campaigns
Performance
Goals
Service
Cases
My Active Marketing Lists
Search for records
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
Contoso

Abbie Moss

abbie_moss@collinsreedandhoward.com

LOYID_1000

Contoso

129 Miller Plaza
Fairfield
California
10753
USA

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: 773

Lifetime Value: 5322

Recommendations

Customer Check-In

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

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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

unicef

Video: UNICEF inspires donors with Microsoft Dynamics 365 Customer Insights

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

Customer Insights

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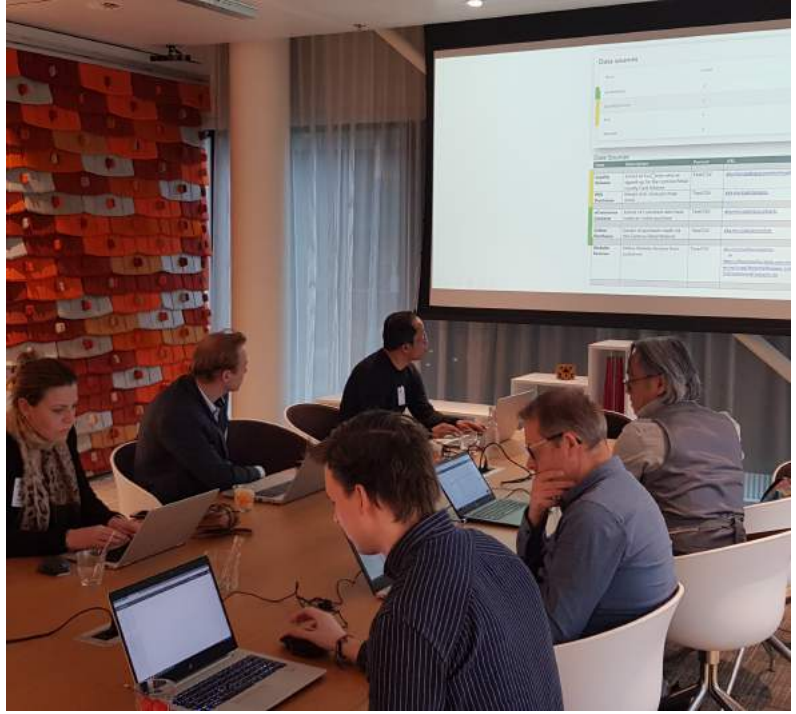
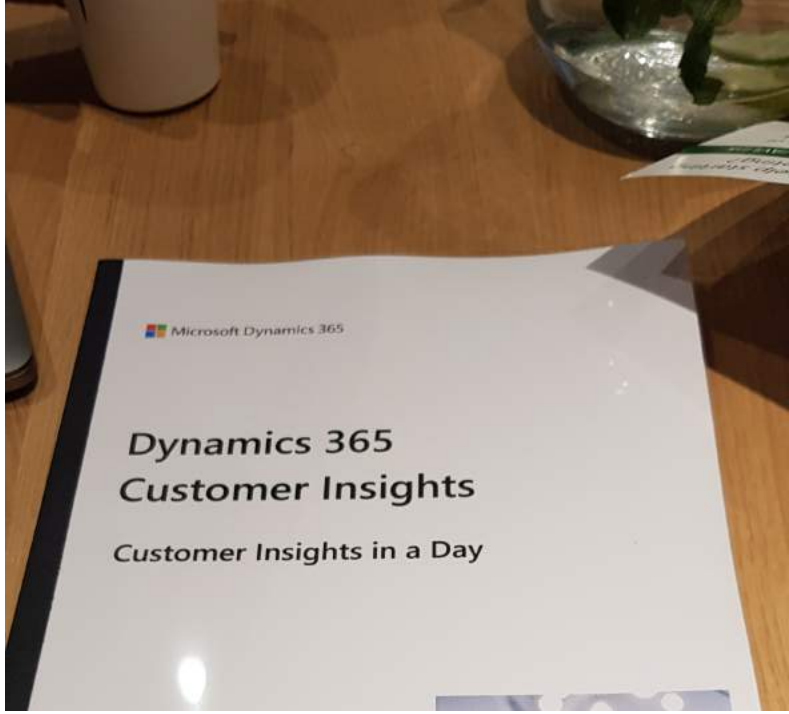
Workshops

- Customer Insights in a day

  →Workshop @MS or @BB
  10.00 – 16.00

  →Virtual
- Workshop Own Data
- Pilot





Customer Insights offering

Inspire & Learn

Proof of Concept
Customer Insights

Kickstart

360-degree view
Customer Insights

Premium

Digitally
transformed
customer journey

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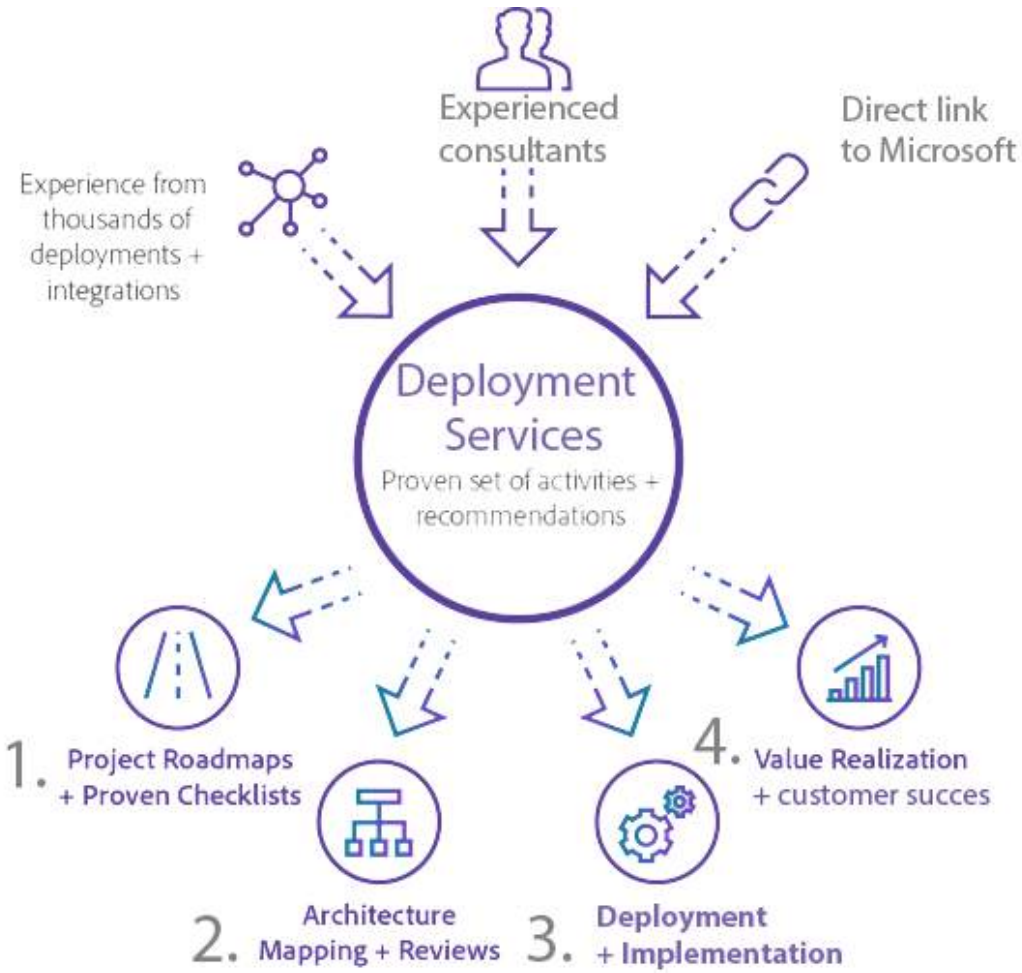
Approach & Methods

BusinessBase has around 20 years of experience and helped more then 200 organizations with CRM, Customer Engagement and relationship management. With 30 Customer Engagement specialists BusinessBase helps building the ambitions of customers.

The combined knowledge and implementation method results in proven successfull implementations and results in a faster time-to-value.



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