2. november 2023

Customer Journey

Agenda

09.00-09:10 : Velkommen v. Morten Fritsch, Head of Sales, Delegate

09:10-10:00: HeyDay v. Thomas Smith, UX/UI Specialist og partner hos Heyday
- Præsentation af HeyDay
- Hvordan ser det digitale økosystem ud i dag? – Intro til den nye data-virkelighed
- Brugerrejsen som digitalt værktøj – Indsigter på en ny kontrakt

10:00-10:10: Pause

10:10-11:40 Delegate v. ~~Rune Daub~~, Dan Aakesen, Principal Consultant, Anne Sofie F. Hansen, Delegate
- Præsentation af Delegate
- Hvorfor er Microsoft Dynamics-platformen bygget til datadrevne beslutninger?
- Intro til Microsofts tanker set fra et kommercielt og low-code synspunkt

11:40-12:00 Microsoft v. Christian Koch Bentzen, Go to Market Lead (Business Applications)
- Muligheder og fremtiden med AI i en customer experience kontekts

12:00: Lunch

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The way we think

Boutique

Peoples Place

Office Vibe

The Team

+220

Founded

2006

Part of something bigger

TDN

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The value we bring to our customers....

Experience

Insights

Optimization

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How we work!

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What..

Business Value and analysis

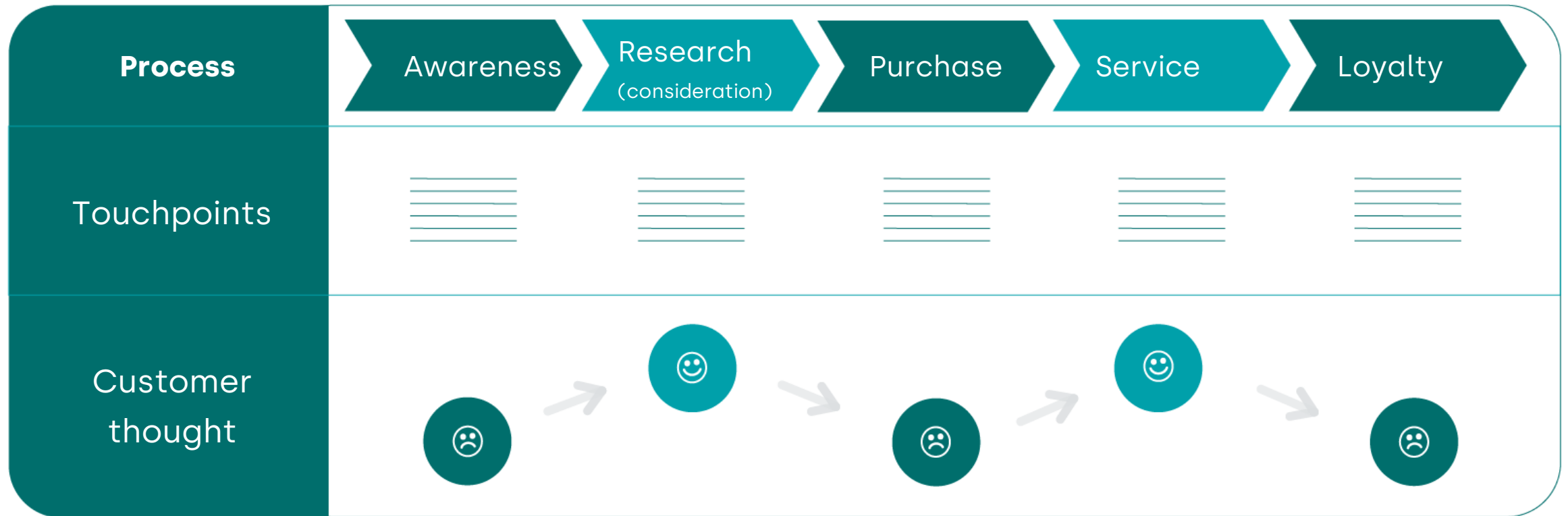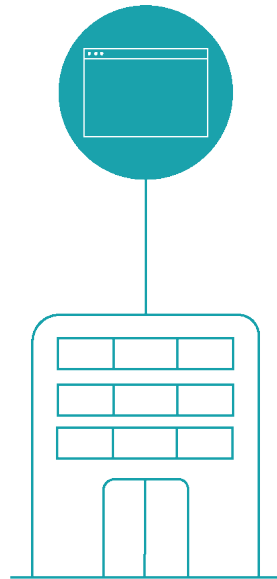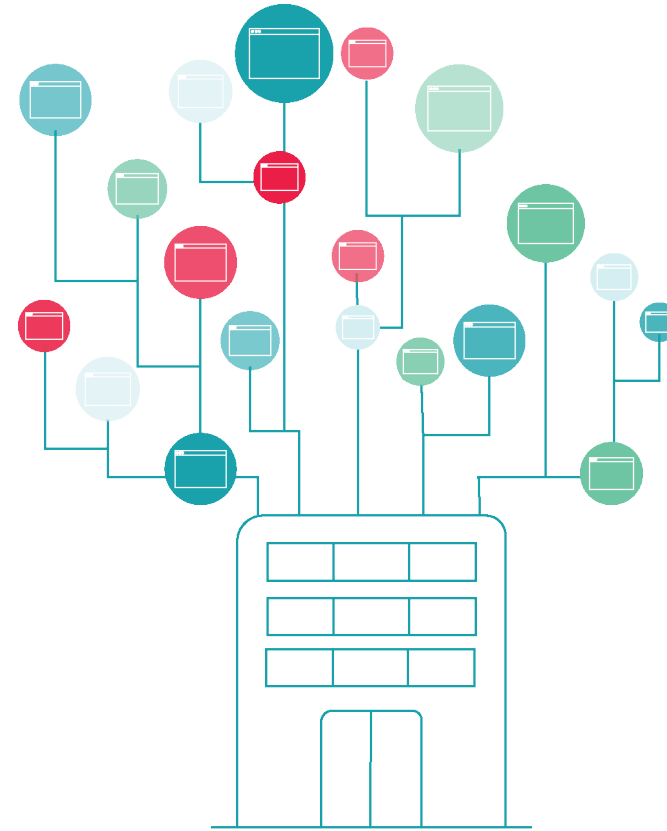| Cloud Foundation & Acceleration	Low Code for quick innovation	Support digital customer journey	Modern workplace transformation	Leverage Data & AI	Build modern cloud applications

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2. november 2023

Customer Journey

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Customer are "everywhere"......

Process	Awareness	Research (consideration)	Purchase	Service	Loyalty
Touchpoints					
Customer thought	☹	☺	☹	☺	☹

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Best-of-suite

Best-of-breed

Blueprint

LOB

Customer dataplatform (CDP)

Productivity & collaboration + **Business data & processes**

Microsoft 365   Microsoft Dynamics 365

Integration

OpenAI

Databrciks   Fabrick

ERP   PLM   PIM
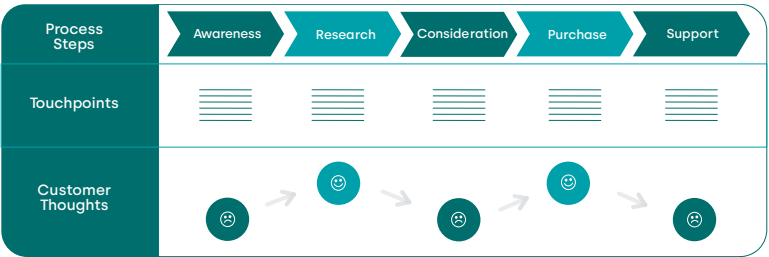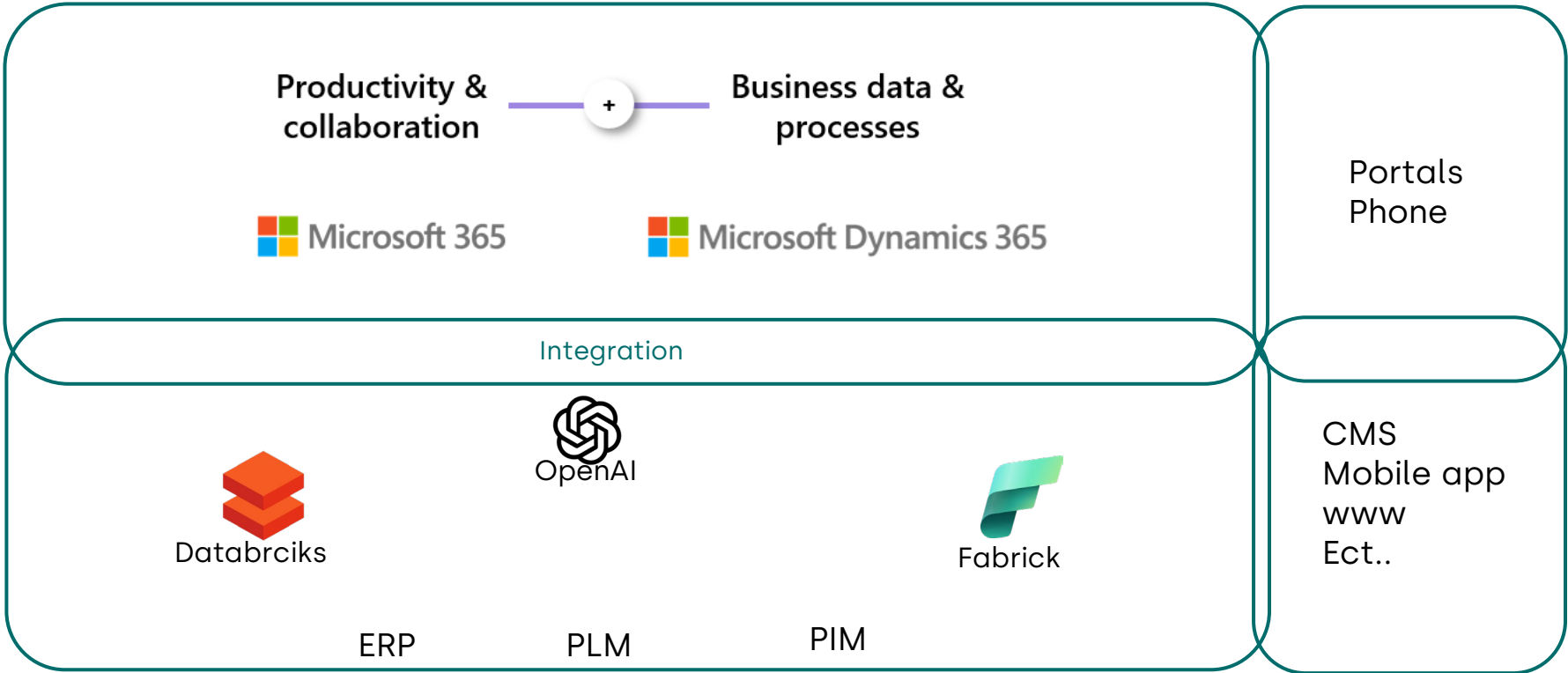
Portals
Phone

CMS
Mobile app
www
Ect..

Customer

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Quick show of hands...

1. How many knows what D365 is ?

2. How many knows what Customer Insigths is ?

3. How many are using Customer Insights today ?

4. How many are aware of that its no longer called D365 Marketing or Customer Insights....?

Now as 1 product: **D365 Customer Insights Data & Journeys**

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Wave 2 2023 - Unified product offering
D365 Customer Insights Data & Journeys

Dynamics 365 Customer Insights + **Dynamics 365 Marketing** = **Dynamics 365 Customer Insights data and journeys**

Bringing together both customer journey orchestration (CJO) and customer data platform (CDP) features in a single offer.
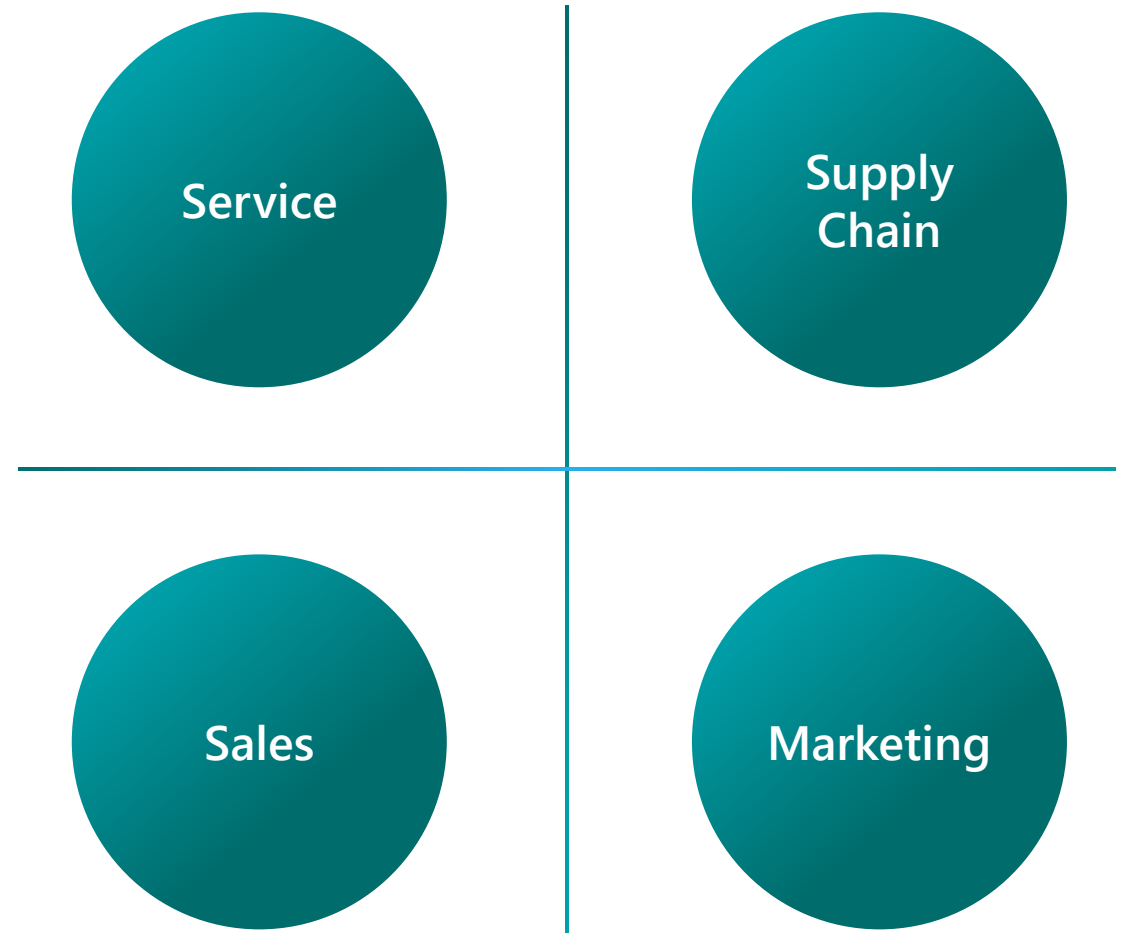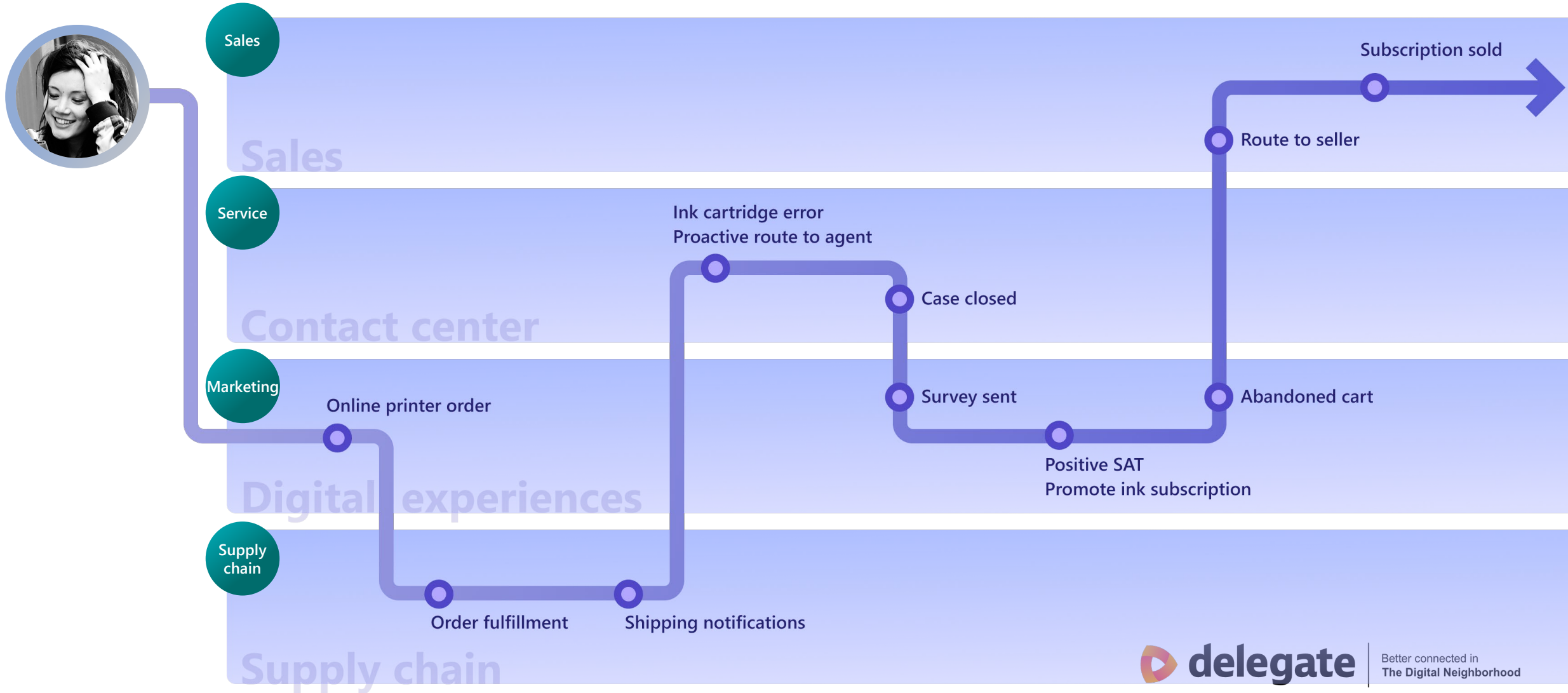
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Data challenges for today and tomorow

Because other systems act in silos, companies do too....

Service

Supply Chain

Sales

Marketing

Customers don't act in silos

Sales

Subscription sold

Sales

Route to seller

Service

Ink cartridge error
Proactive route to agent

Contact center

Case closed

Marketing

Survey sent

Abandoned cart

Online printer order

Digital experiences

Positive SAT
Promote ink subscription

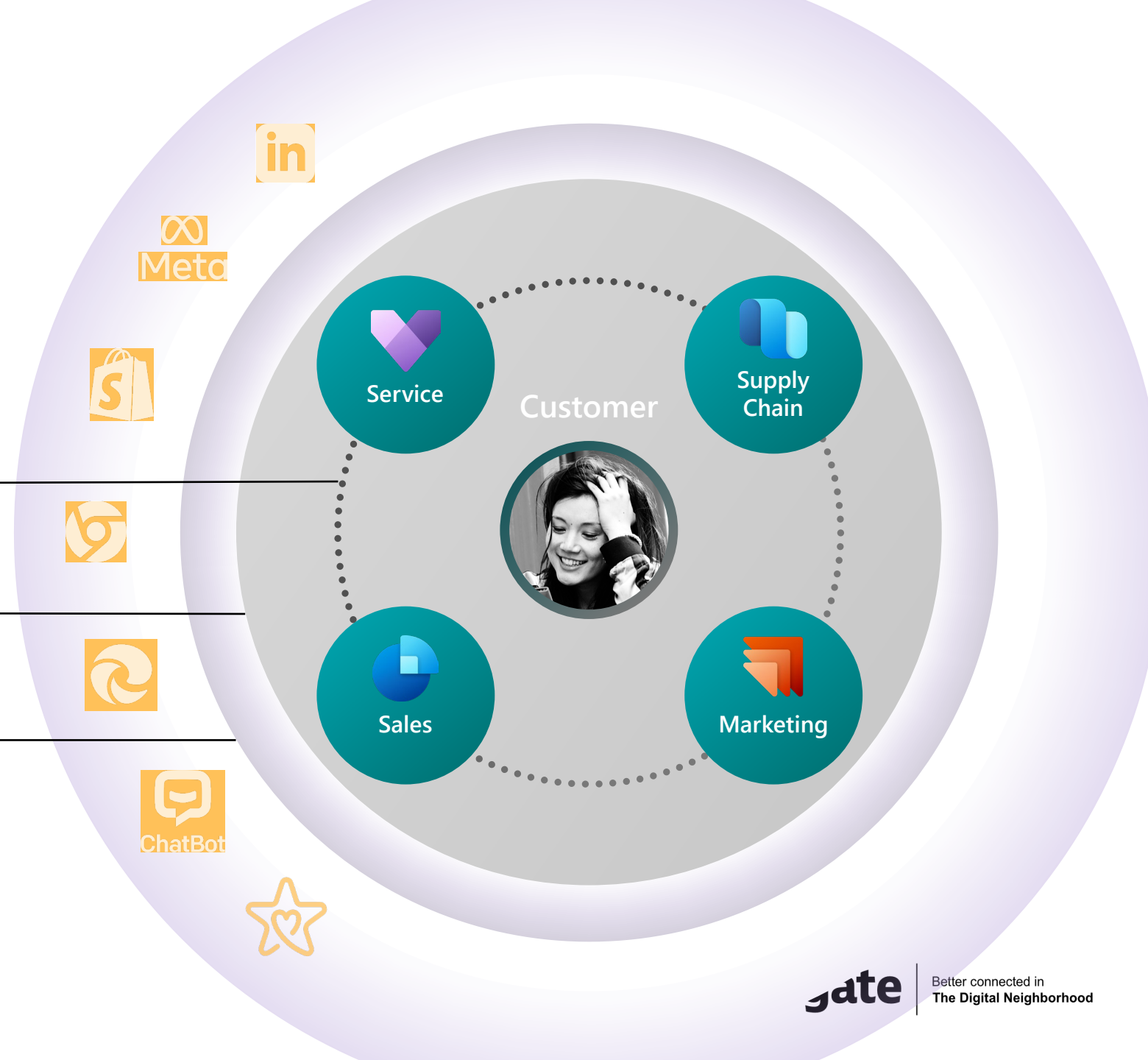Supply chain

Order fulfillment

Shipping notifications

Supply chain

Into this

Cohesive customer journeys

Dataverse - Unified data platform across all business apps

360-degree view of the customer

Customer

Service

Supply Chain

Sales

Marketing

LinkedIn

Meta

ChatBot

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We can turn this...

Service

Supply Chain

Sales

Marketing

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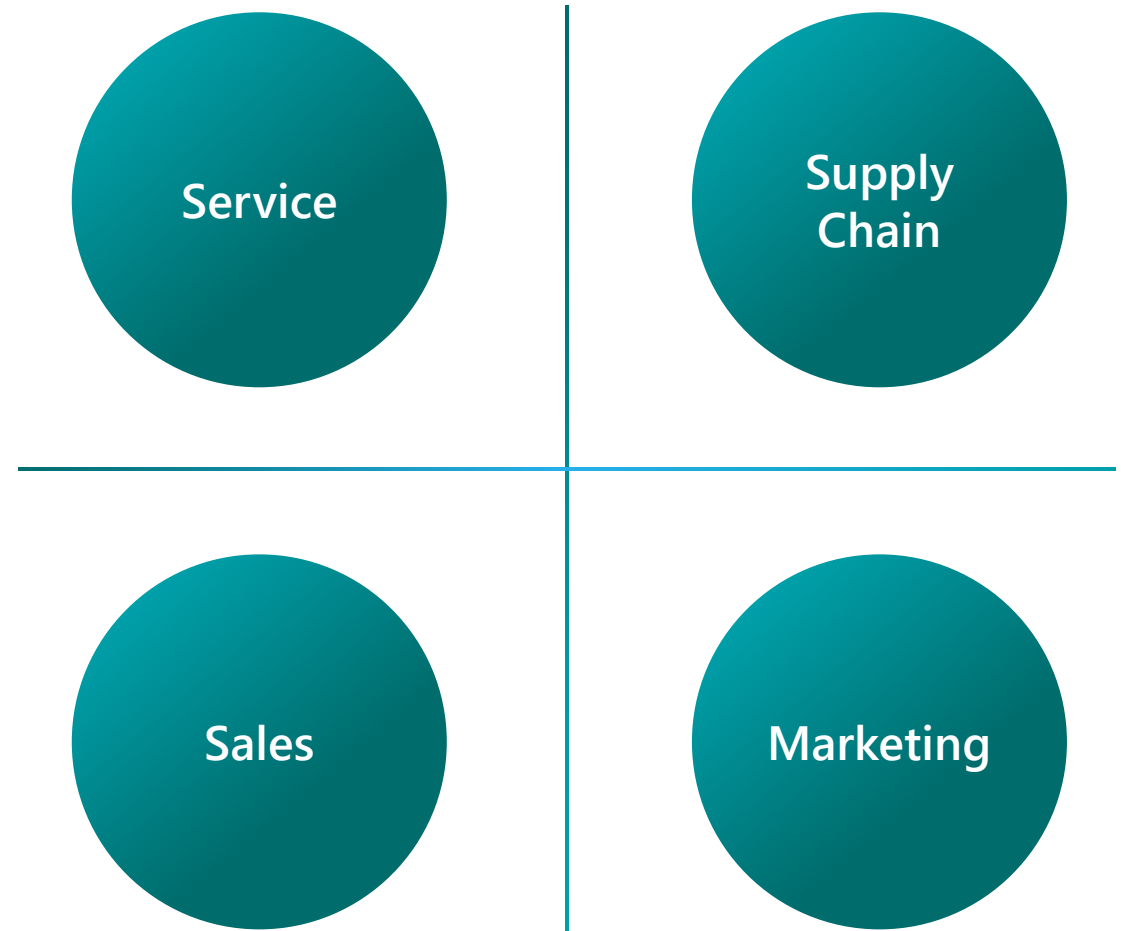
Data driven decisions in D365 CE - Example

Sales

Marketing

Service

Lead gen

Campaigns

Website

Products, services, & subscriptions

Seller Recommendations

Next best action (activities)

Cross-sell/upsell

Omni-channel support

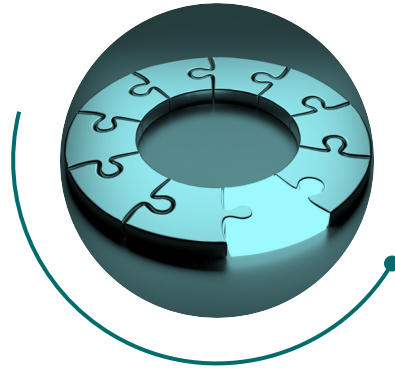delegate | Better connected in **The Digital Neighborhood**

Adopting technology trends... in Customer Journeys

Data first
Personalized experiences

Collaboration
Connecting systems

Low code
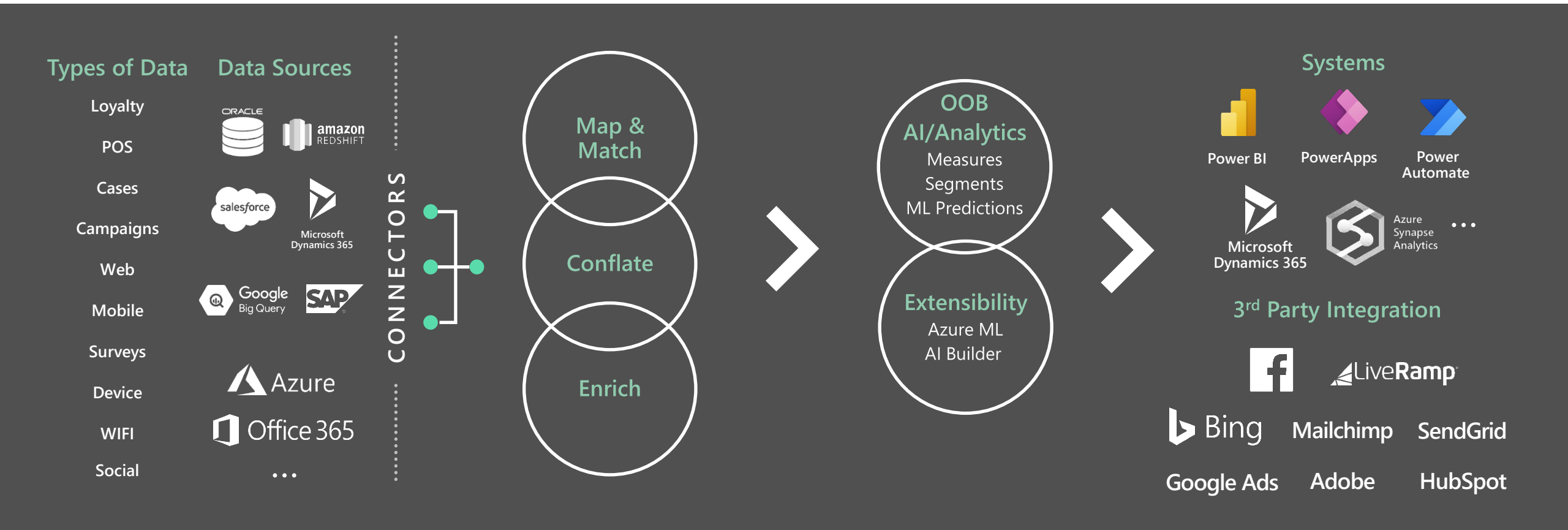Democratized customization

Driven by AI

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Difference between D365 and Customer Insights

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Dynamics 365 – a suite of applications

Customer Insights – Customer Data Platform

Types of Data
- Loyalty
- POS
- Cases
- Campaigns
- Web
- Mobile
- Surveys
- Device
- WIFI
- Social

Data Sources
- ORACLE
- amazon REDSHIFT
- salesforce
- Microsoft Dynamics 365
- Google Big Query
- SAP
- Azure
- Office 365
- ...

CONNECTORS

- Map & Match
- Conflate
- Enrich

OOB AI/Analytics
Measures
Segments
ML Predictions

Extensibility
Azure ML
AI Builder

Systems
- Power BI
- PowerApps
- Power Automate
- Microsoft Dynamics 365
- Azure Synapse Analytics
- ...

3rd Party Integration
- Facebook
- LiveRamp
- Bing
- Mailchimp
- SendGrid
- Google Ads
- Adobe
- HubSpot

Data — Unification — Insights — Action

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Who should work with Customer Insights and how?

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Who should work with Customer Insights

Data platforms are for data **analysts**....

Customer insights is for the **business**.

Customer Journey Map
Here Are the Basic Elements of a Customer Journey Map.

PROCESS STEPS	Awareness	Research	Consideration	Purchase	Support
TOUCHPOINTS					
CUSTOMER THOUGHTS					

Forbes ADVISOR

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Data

Types of Data
- Loyalty
- POS
- Cases
- Campaigns
- Web
- Mobile
- Surveys
- Device
- WIFI
- Social

Data Sources

ORACLE

amazon REDSHIFT

salesforce

Microsoft Dynamics 365

Google Big Query

SAP

Azure

Office 365

...

CONNECTORS

Map & Match

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Power BI

PowerApps

Power Automate

Microsoft Dynamics 365

Azure Synapse Analytics

...

3rd Party Integration

LiveRamp

Bing   Mailchimp   SendGrid

Google Ads   Adobe   HubSpot

Data — Unification — Insights — Action

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Primary target audience
Individual consumers

Home
Customers
Data
    Data sources
    Unify
    Enrichment
    Activities
    Tables
    Exports
Insights
Reports (Preview)
Settings

Back to Data sources

Add a data source

Azure Data Lake Storage Gen2

Azure Synapse Analytics (Preview)

Microsoft Dataverse

Delta Lake (Preview)

Microsoft Power Query

Customer Insights data library

Attach your Delta Lake data stored in Azure Data Lake Storage.

Data source name *

The name must begin with a letter and can include numbers. Spaces and special characters aren't allowed. Once saved, you can't rename a data source.

Description (optional)

Connect your storage using *
Azure subscription

Subscription *

Resource group *

Storage account *

☐ Enable Azure Private Link ⓘ

Container *

To allow Customer Insights to connect to the storage account, please add the Dynamics 365 AI for Customer Insights service principal as the Storage Blob Data Contributor role to the container. Learn more

Connection to Azure Synapse *

Power Query

Get data
New source

Search

All | File | Database | Microsoft Fabric (Preview) | Power Platform | Azure | Online services | ··· Other

Excel workbook	Text/CSV	XML	JSON	Folder	PDF	Parquet	SharePoint folder	SQL Server database
File	File	File	File	File	File	File	File	Database
Access	SQL Server Analysis Servic...	Oracle database	IBM Db2 database	MySQL database	PostgreSQL database	Teradata database	SAP HANA database	SAP BW Application Server
Database	Database	Database	Database	Database	Database	Database	Database	Database
SAP BW Message Server	Snowflake	Google BigQuery	Amazon Redshift	Impala	Dataflows	KQL Database (preview)	Dataverse	Dataflows
Database	Database	Database	Database	Database	Microsoft Fabric (Preview)	Microsoft Fabric (Preview)	Power Platform	Power Platform
Azure SQL database	Azure Synapse Analytics (...	Azure Analysis Services	Azure Blobs	Azure Tables	Azure Data Explorer (Kusto)	Azure Data Lake Storage ...	Azure HDInsight Spark	SharePoint Online list
Azure	Azure	Azure	Azure	Azure	Azure	Azure	Azure	Online services
Microsoft Exchange Online	Salesforce objects	Salesforce reports	Google Analytics	Adobe Analytics	Web API	Web page	SharePoint list	OData
Online services	Online services	Online services	Online services	Online services	Other	Other	Other	Other
Spark	Odbc	FHIR	Blank table	Blank query				
Other	Other	Other	Other	Other				

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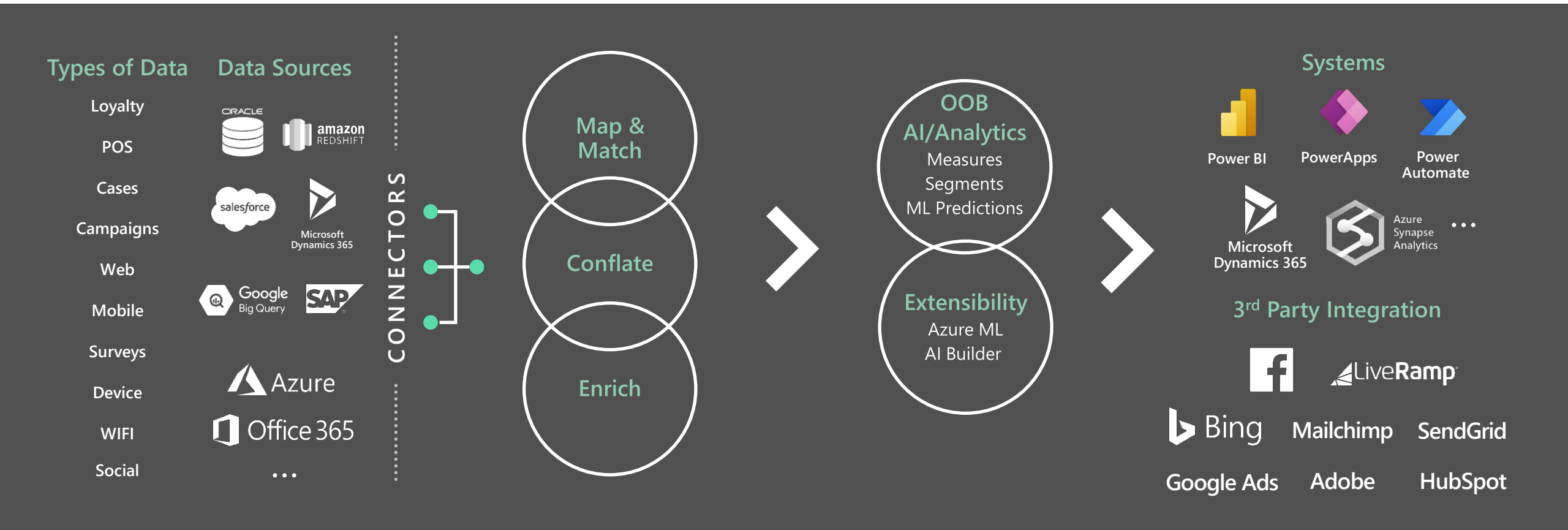
UNIFICATION

Select tables and fields with customer profile data

Unify

Source fields 13 Source fields	**Duplicate records** 131 Duplicate records	**Matching conditions** 6 Matched records	**Unified customer fields** 20 Unified fields
Define the customer fields found in your datasets	Select which record to keep when duplicates are found	Define rules for matching records between tables	Review and edit customer profile fields
Edit	Updated: 7 days ago Edit	Updated: 7 days ago Edit	Updated: 7 days ago Edit

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Add rules to merge duplicate records

	Order	Name		Source records	Unique records	Records deduplicated	Merge records by
∨							
∨		contact : Dataverse					Most filled
	+ Add rule		🗑				
∨		Sheet1 : CustomerDataV3					Most filled
	+ Add rule						

Create rule ✕

Make a rule for how to handle duplicate data by setting conditions that compare fields from differing entities. Learn more

Conditions

Condition 1 🗑

Select entity | Select field
Contacts : eCommerce ∨ | FullName ∨

Entity | Select field
Customers : Loyalty | FullName ∨

Normalize | Select options ∨

Precision | Basic ∨

[slider] High

Condition 2 🗑

Select entity | Select field
Contacts : eCommerce ∨ | EMail ∨

Entity | Select field
Customers : Loyalty | EMail ∨

Normalize | Select options ∨

Precision | Basic ∨

[slider] High

Name *
FullName, EMail

+ Add condition | **Done** | Cancel

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Set up match rules and conditions

ENRICH

INSIGHTS

Types of Data
- Loyalty
- POS
- Cases
- Campaigns
- Web
- Mobile
- Surveys
- Device
- WIFI
- Social

Data Sources
- ORACLE
- amazon REDSHIFT
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- Microsoft Dynamics 365
- Google Big Query
- SAP
- Azure
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- HubSpot

Data ········· Unification ········· Insights ········· Action

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SEGMENTS

Segments

All segments   Suggestions (preview)   Insights (preview)

Display name ↑	Tags	Type
Account created with no purchase		Dynamic
First time buyers segment		Dynamic
High engagement segment		Dynamic
High spenders segment		Dynamic
Low engagement segment		Dynamic
Low spenders segment		Dynamic
VIP segment		Dynamic

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MEASURES

Emails Opened   Edit details

Measure saved in **Customer_Measure** table.

Set up your measure calculations

Choose a function and add at least one attribute for your calculation

Measure type ⓘ   〇 Customer   ⿲ Relationship path | ▽ Filter   ▦ Dimensions (1)

Emails Opened   ⋮

Function type   **Measure expression**

Sum   ⌄   CustomerDataV3_Sheet1.EmailsOpened977451400

＋ Add attribute   ☰ Rules | ＋   —   ✕   ／   % x^y | (   )

＋ New calculation

Emails Opened

Last updated 7 days ago

📈 **96**

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ACTION
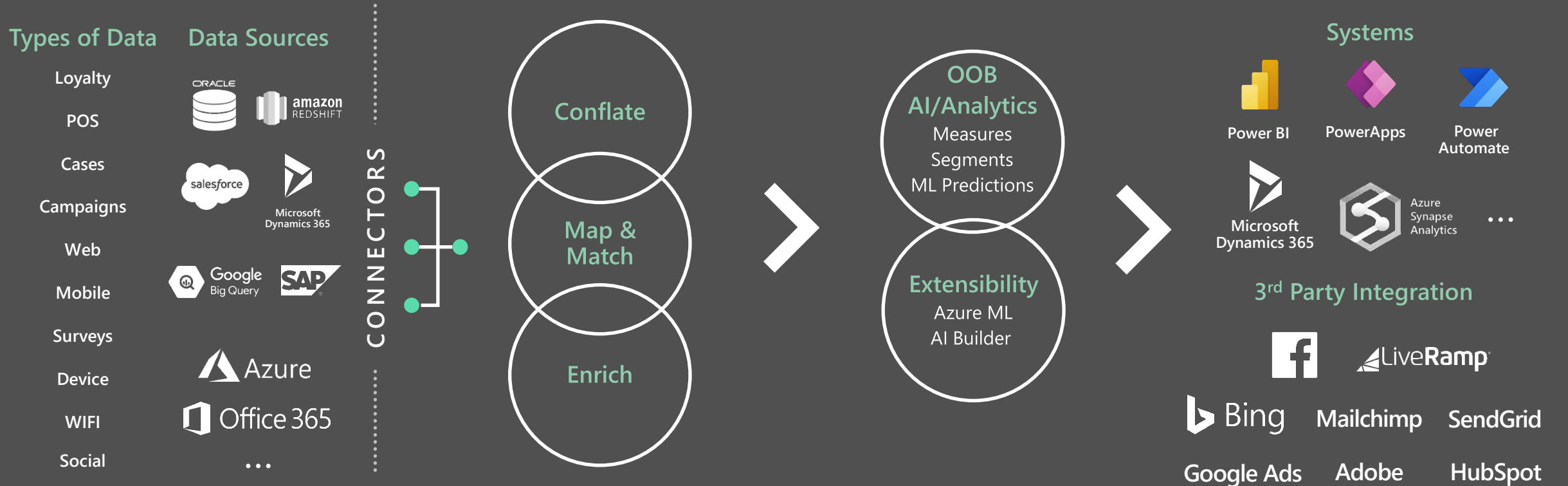
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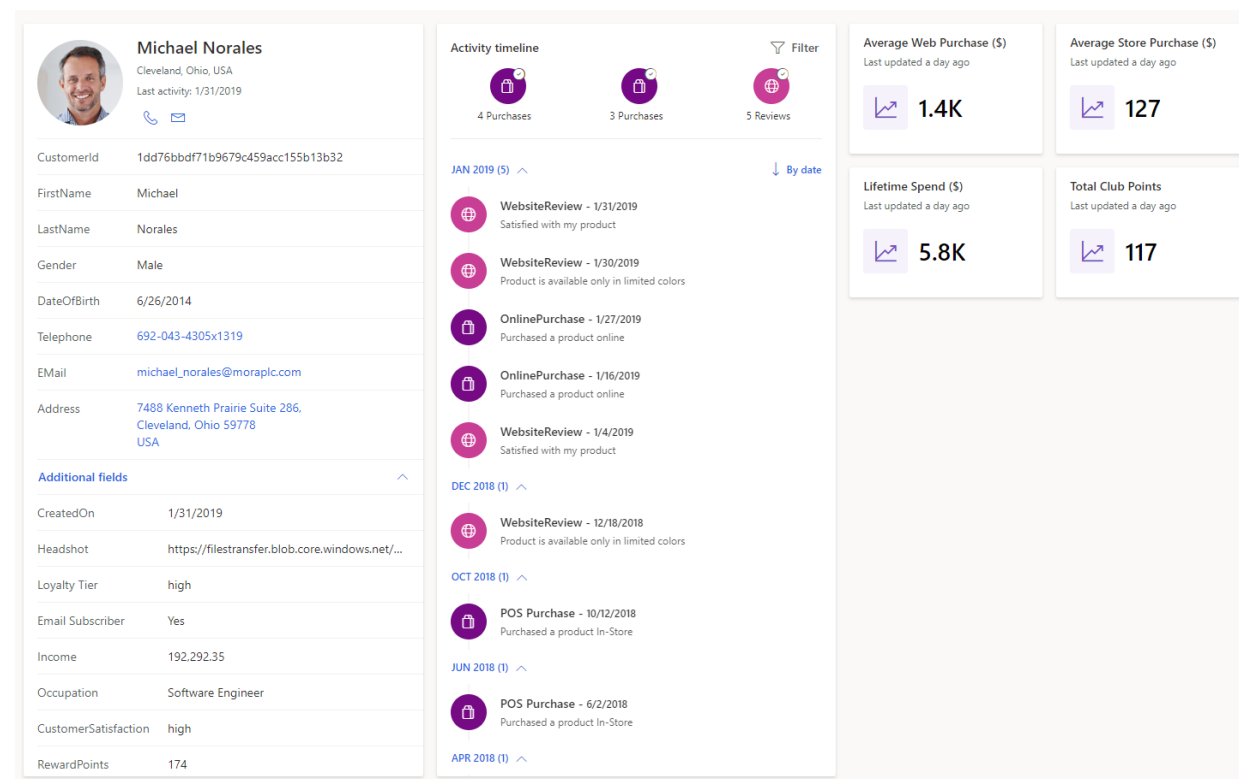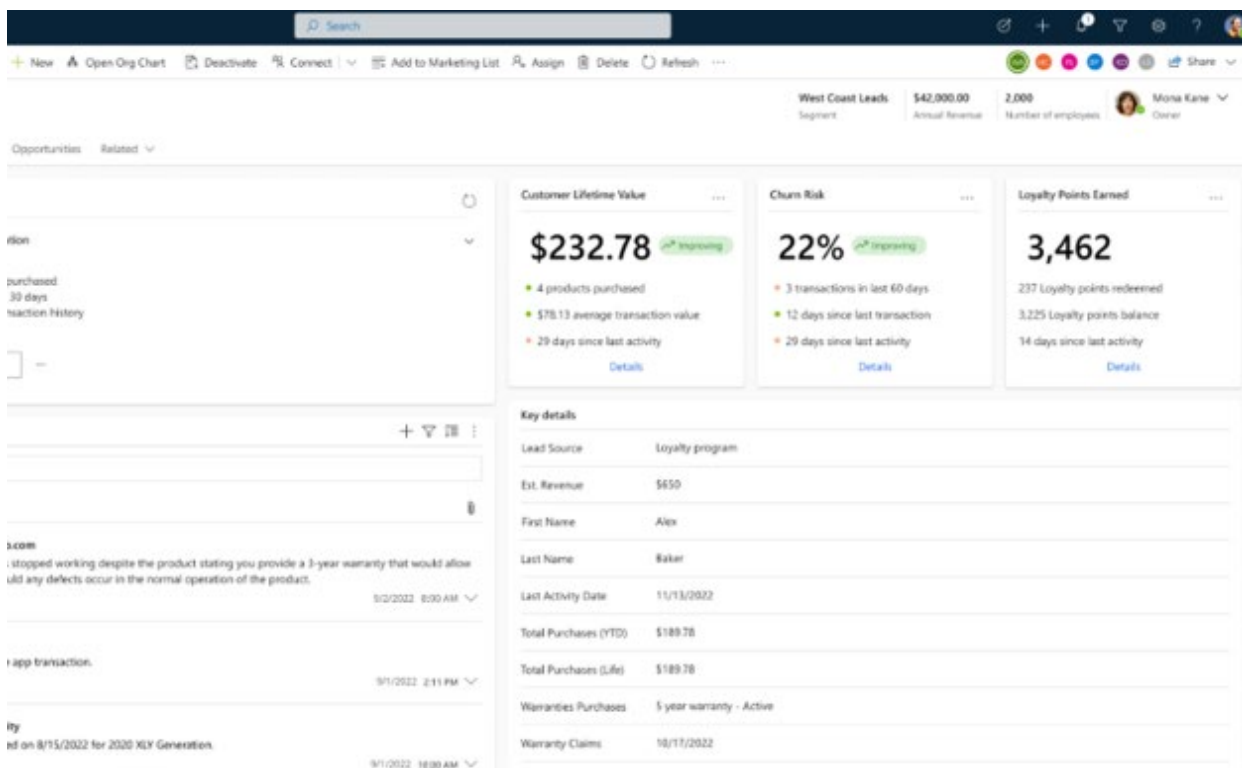
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Customer insights walkthrough
Demo

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Pillars of the Platform

Data first
Personalized Experiences
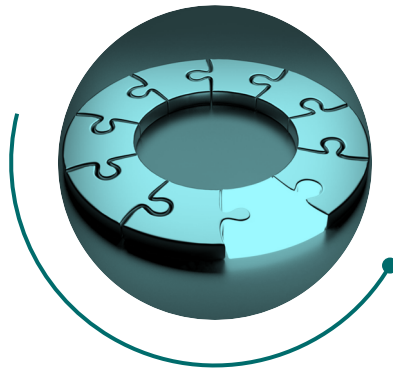
Collaboration
Connecting Sales and Marketing

Low code
Democratized customizations

Driven by AI

Data first
Personalized Experiences
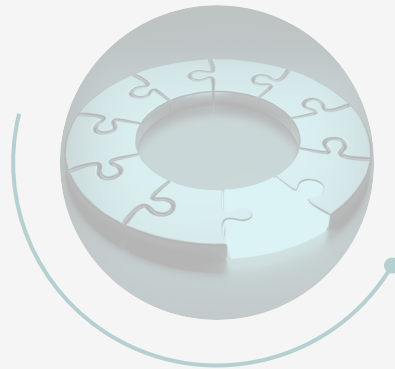
Collaboration
Connecting Sales and Marketing

Low code
Democratized customization

Driven by AI

Customizable consent and preference centers

- Configure real-time marketing preference centers that represent your brand's look and feel with new logo, style, and color options.

- Create multiple, line of business specific preference centers and enforce consent independently

- Create and manage topics for customers to opt-in to marketing subscriptions that align with your brands and lines of business without the use of subscription lists.

Microsoft Dynamics 365 Marketing

Limit the number of messages sent to a customer in a specific period to prevent message fatigue

- Decide which journeys should have the frequency cap enabled or disabled.

- Define a specific cap per channel.

- Enable daily, weekly and monthly frequency cap.

- Transactional messages will always be excluded.

- Check which messages have been sent and which are still pending for each customer.

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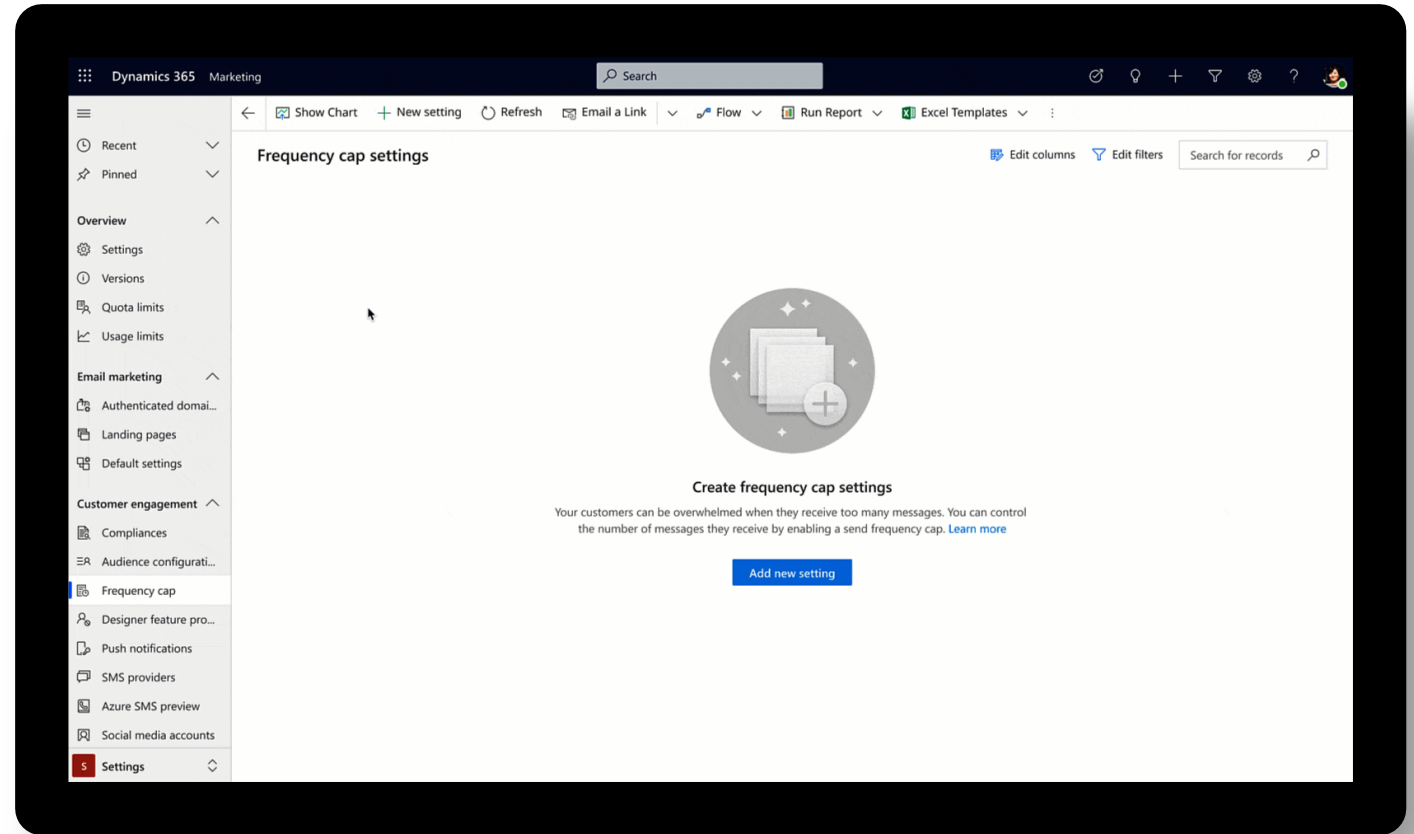
Leverage interaction data to improve your targeting

Create segments based on customers interactions and engagement with your marketing messages, i.e., "customers who opened a newsletter in the last 30 days"
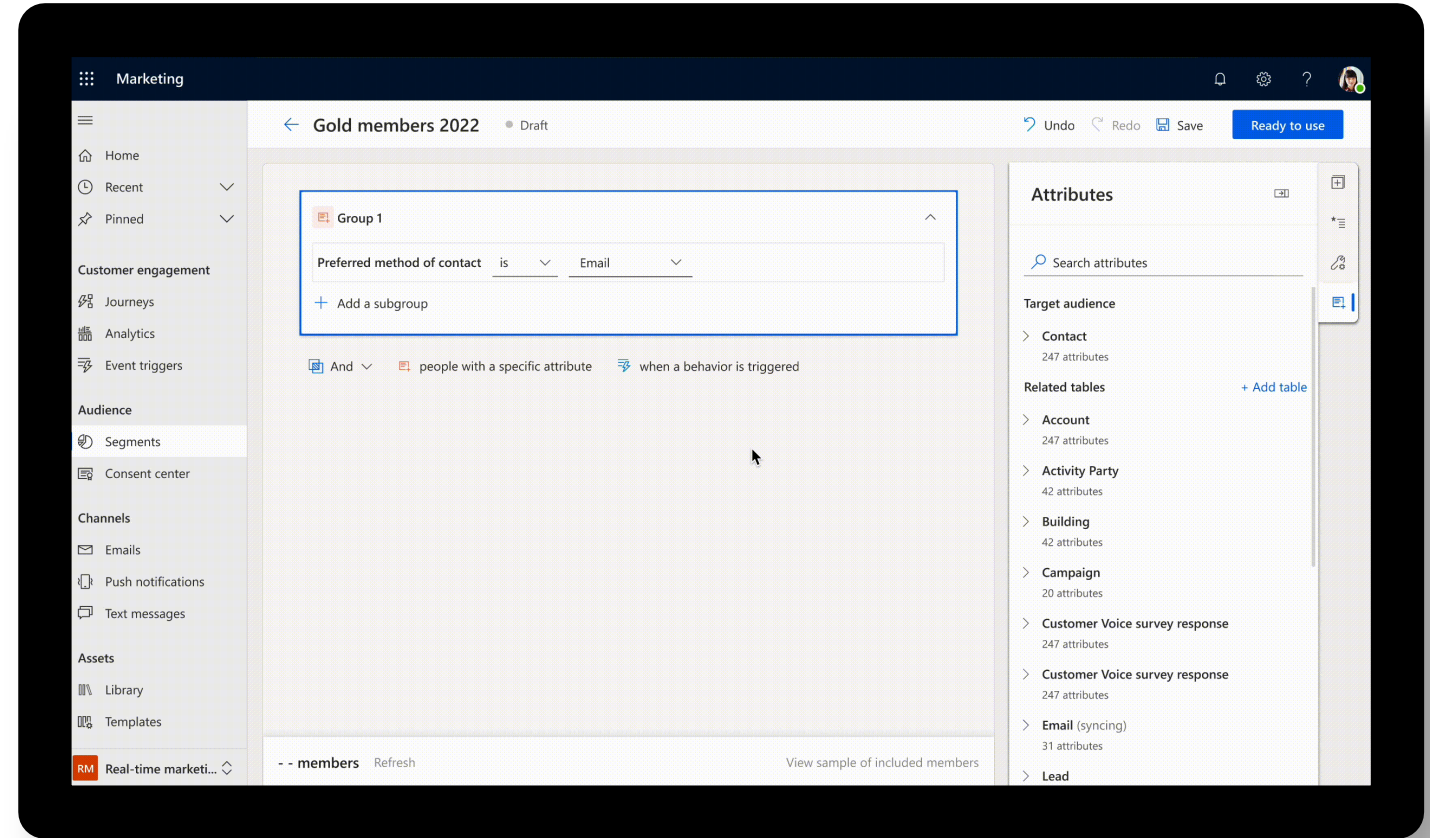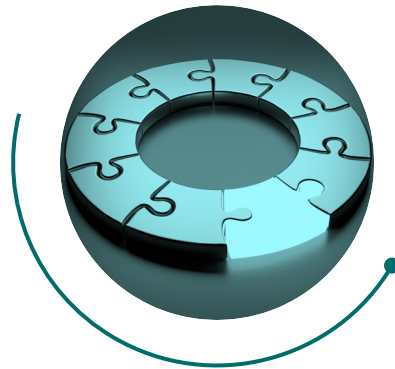
Microsoft Dynamics 365 Marketing

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Data first
Personalized Experiences

Collaboration
Connecting Sales and Marketing

Low code
Democratized customization

Driven by AI

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Optimize your marketing programs and accelerate pipeline through out-of-the-box analytics dashboards

- **Out-of-the-box funnel** to track accounts through the pipeline.

- **Analyze marketing's impact** and contribution:
  - lead generation and qualification
  - opportunity creation
  - revenue generation

- Learn which sources produce the highest quality leads.

- Seamless integration with Dynamics 365 Sales.

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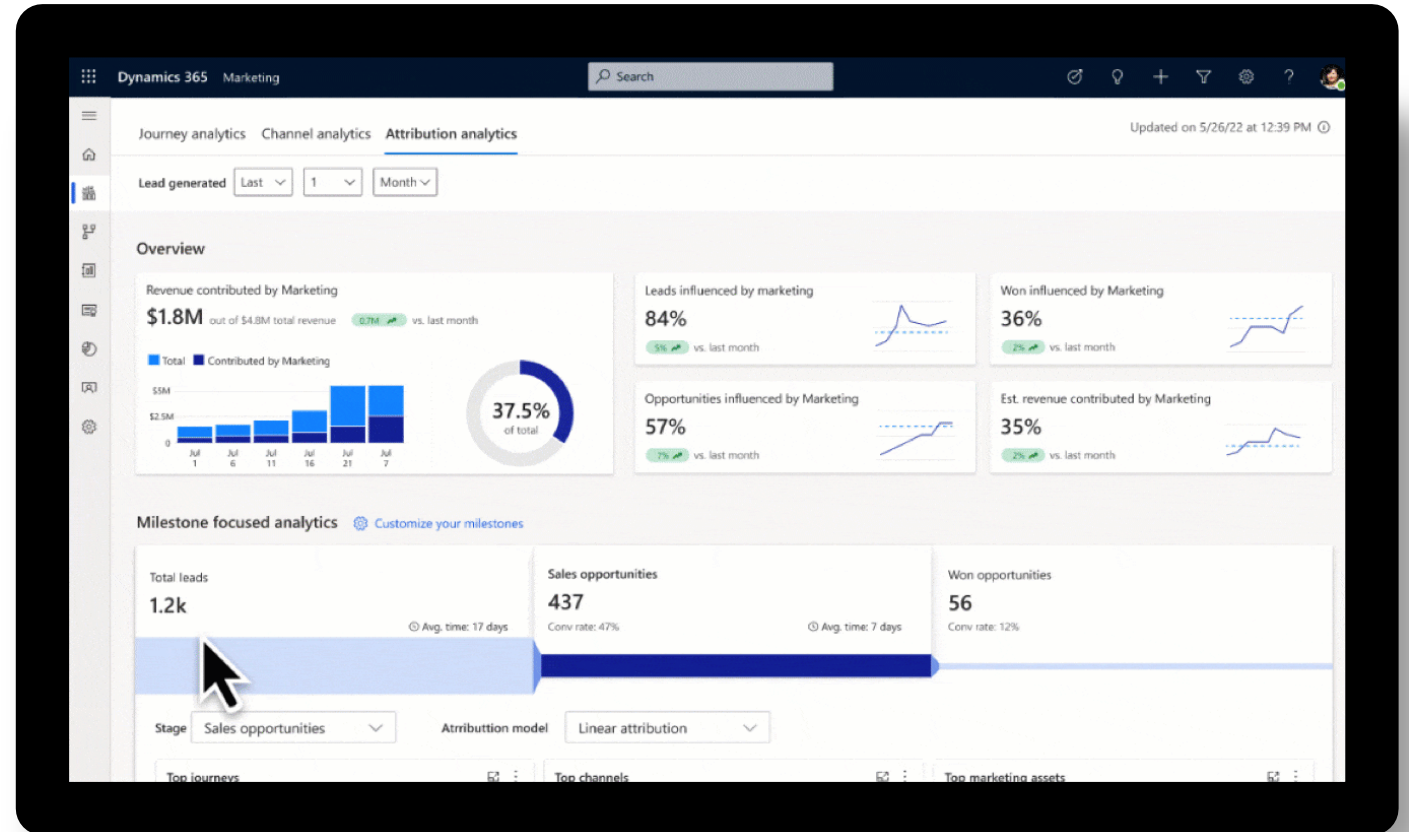
Prioritize the best leads and empower your sellers with the new lead scoring builder

- **Easy-to-use:** start quickly, and update or optimize the model continuously.

- Create lead scoring models with not only **behavioral** but also **demographic or firmographic conditions.**

- Evaluate your scoring model outputs and performance via a **new set of enhanced insights**.

- Define lead qualification criteria and **post-qualification actions**.

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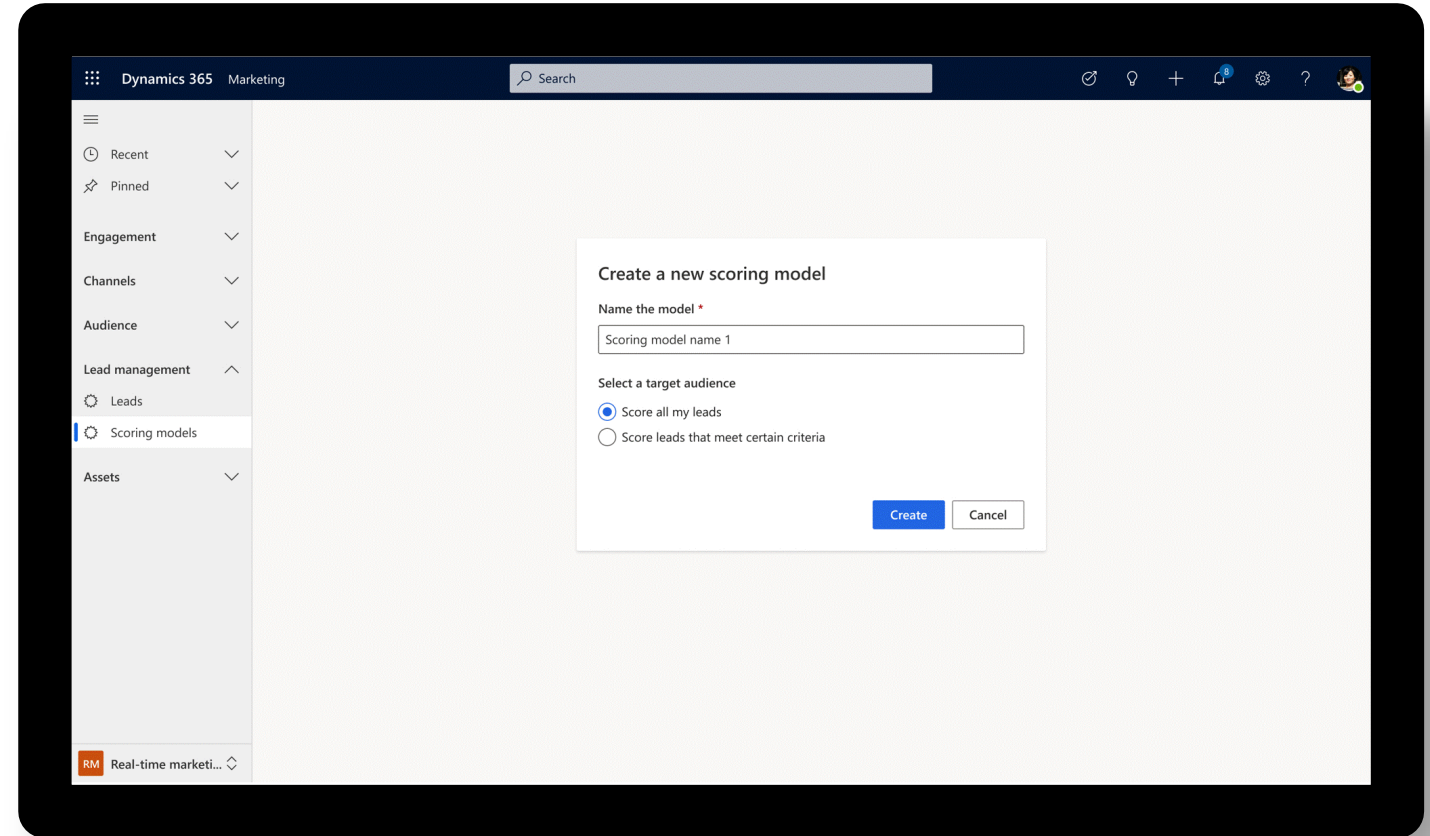
Optimize your lead management process by engaging your sellers right away

- Respond quickly to incoming leads by **routing them directly to sales agents.**

- **Add sales activities** such as phone calls and tasks in your nurture journeys.

- **Trigger a sales sequence** in Dynamics 365 Sales to surface contextual recommendations for the seller picking up the lead.

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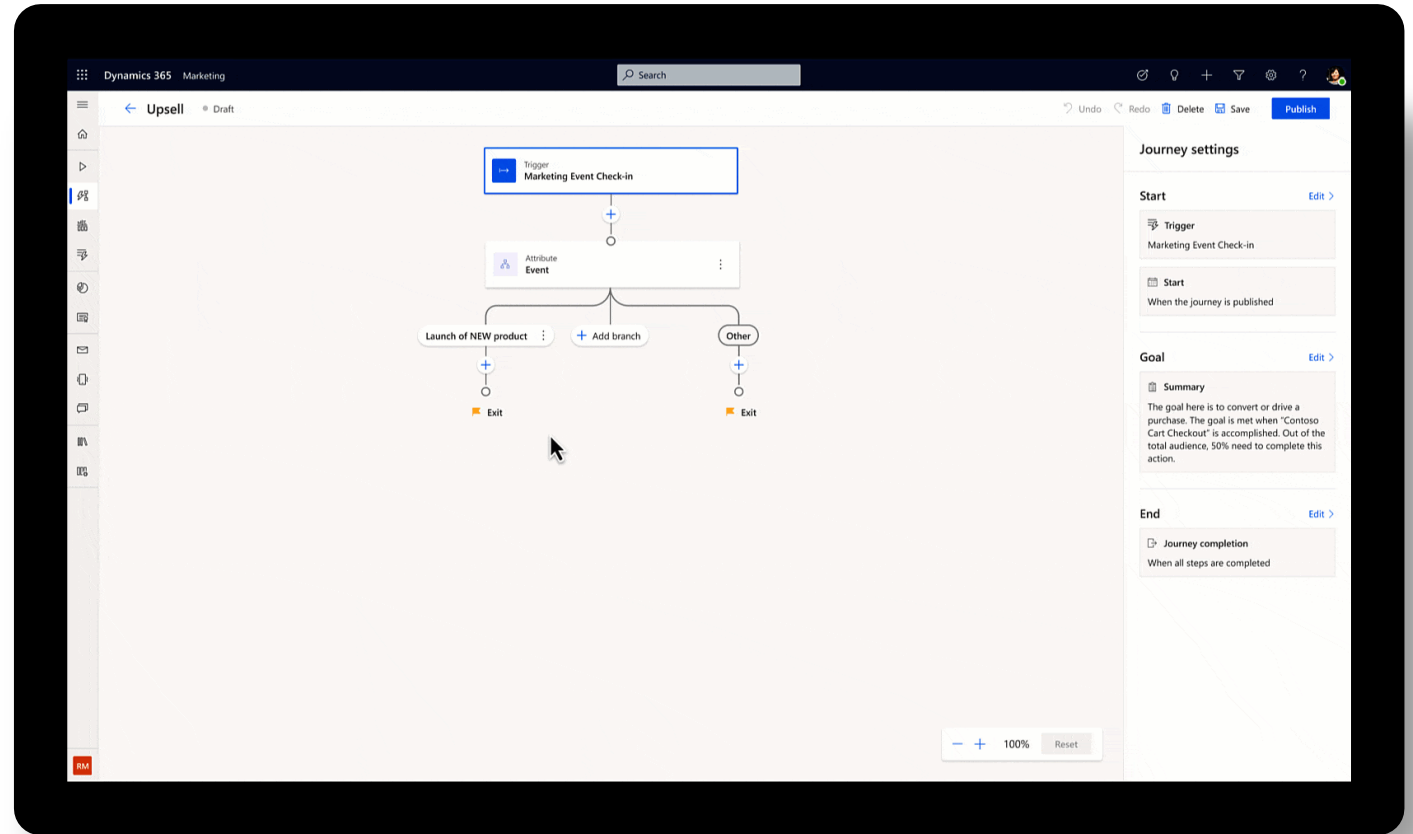
Easily reference a copy of previously sent emails in the interaction timeline

- See an **exact copy of the email** sent in the Contact and lead timeline.

- Know the output generated by advanced personalization features such as conditional content.

- Adjust storage of archived emails to meet your business needs.

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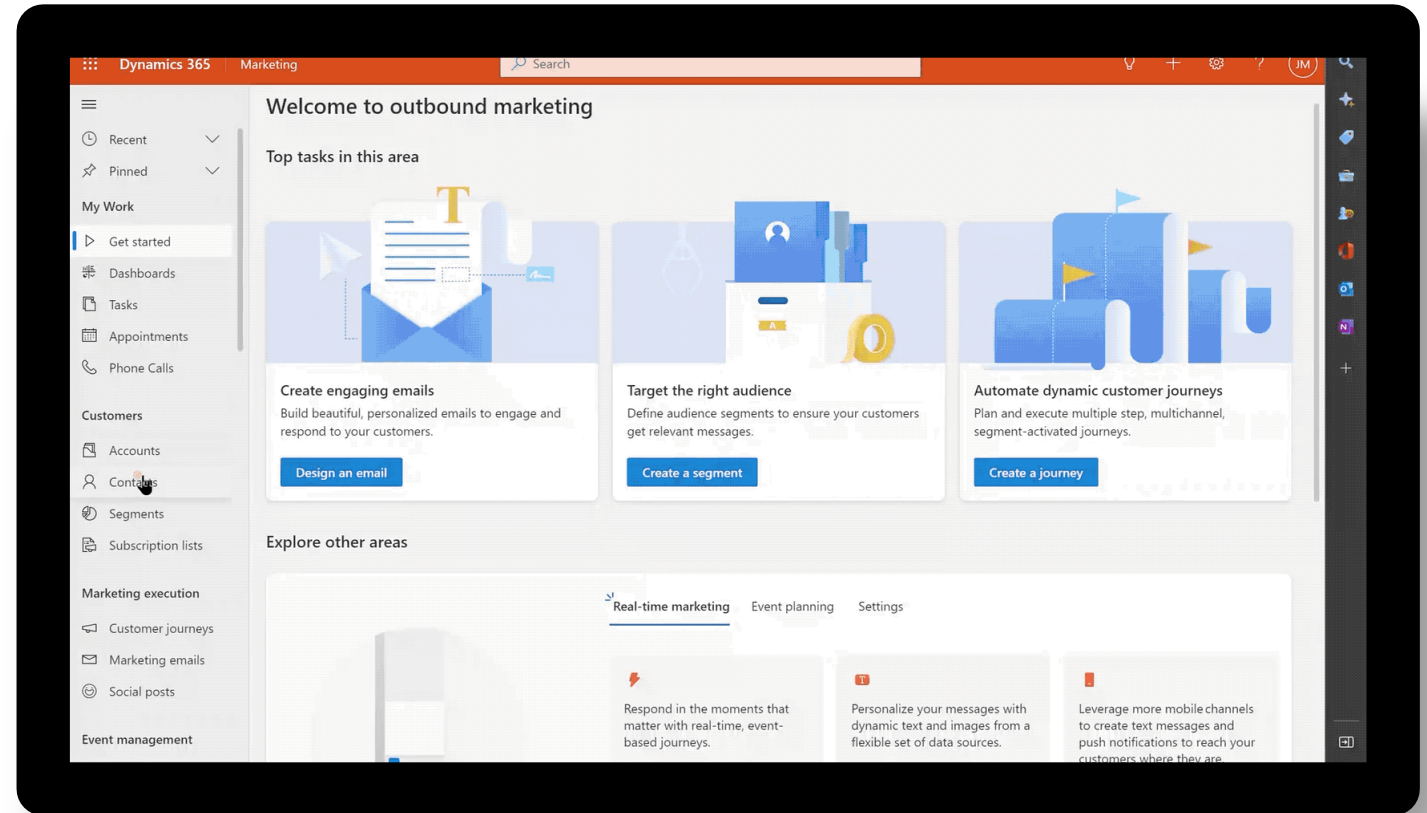
Personalize all customer interactions

Display Customer Insights activities in a Dynamics 365 activity timeline

- Customer Insights activity data **can appear within the same activity timeline already used today.**

  - **Display transactional and behavioral data from Customer Insights** alongside standardized Dynamics Activities, such as Notes, Emails, and Appointments.

- The unified activity timeline will be available across Accounts, Contacts, and Leads.

- Can be filtered, searched, and updated dynamically.
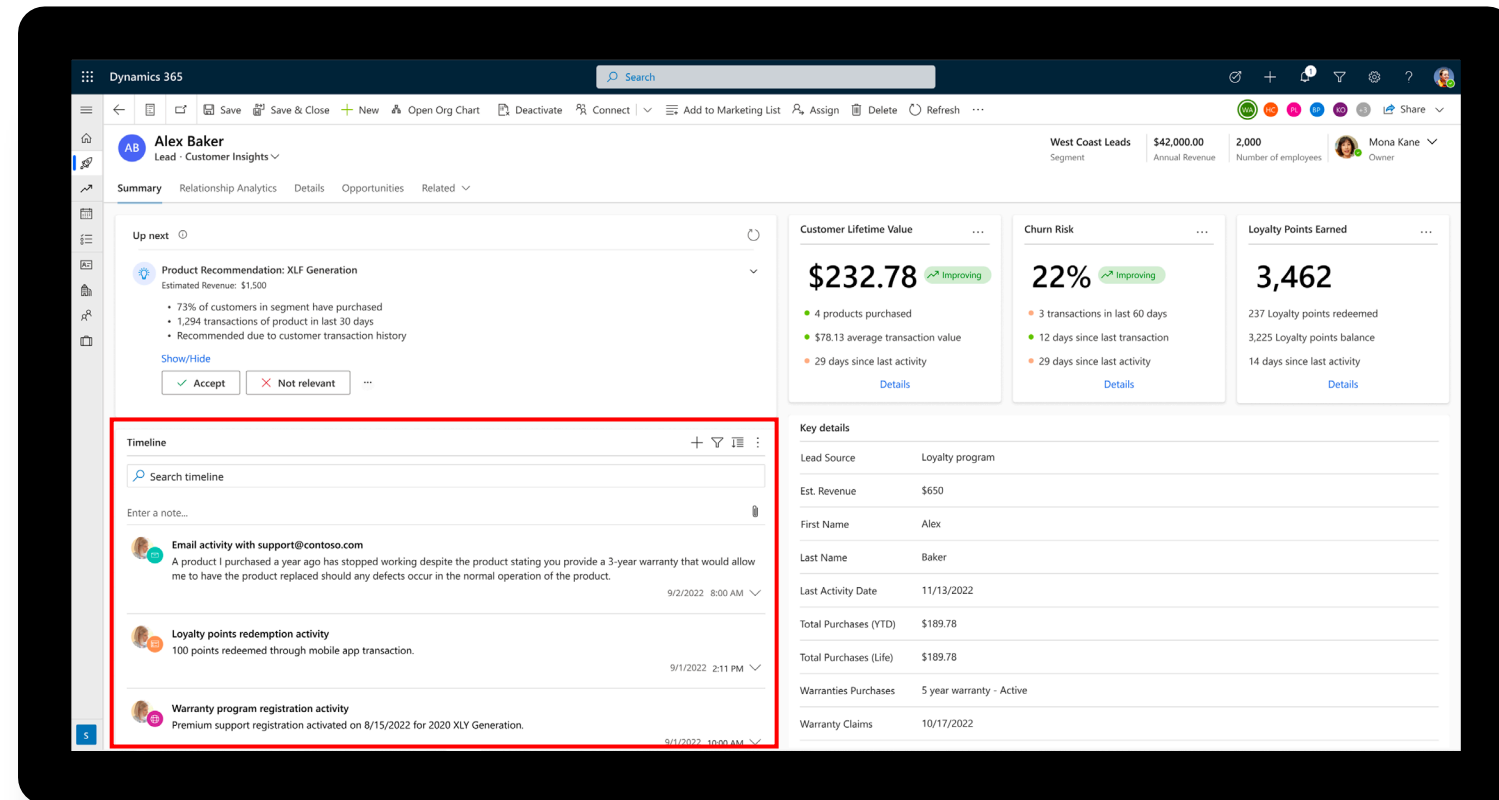
Note: *Product visuals are for illustrative purposes only and may not reflect the feature once available for public preview or when generally available.*

Microsoft Dynamics 365 Customer Insights

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Add relevant insights to Dynamics 365 Sales workflow to increase seller effectiveness

- Configure Contact, Account, and Lead forms to display key attributes from Customer Insights via available Dataverse entities.

- Enable pre-defined insight controls to inform sellers how to best engage individual customers with additional points of relevance to personalize engagements.

    Including:
    - average transaction amount
    - total sales
    - loyalty reward points
    - customer lifetime value
    - churn risk

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Microsoft Dynamics 365 Customer Insights

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Data first
Personalized Experiences

Collaboration
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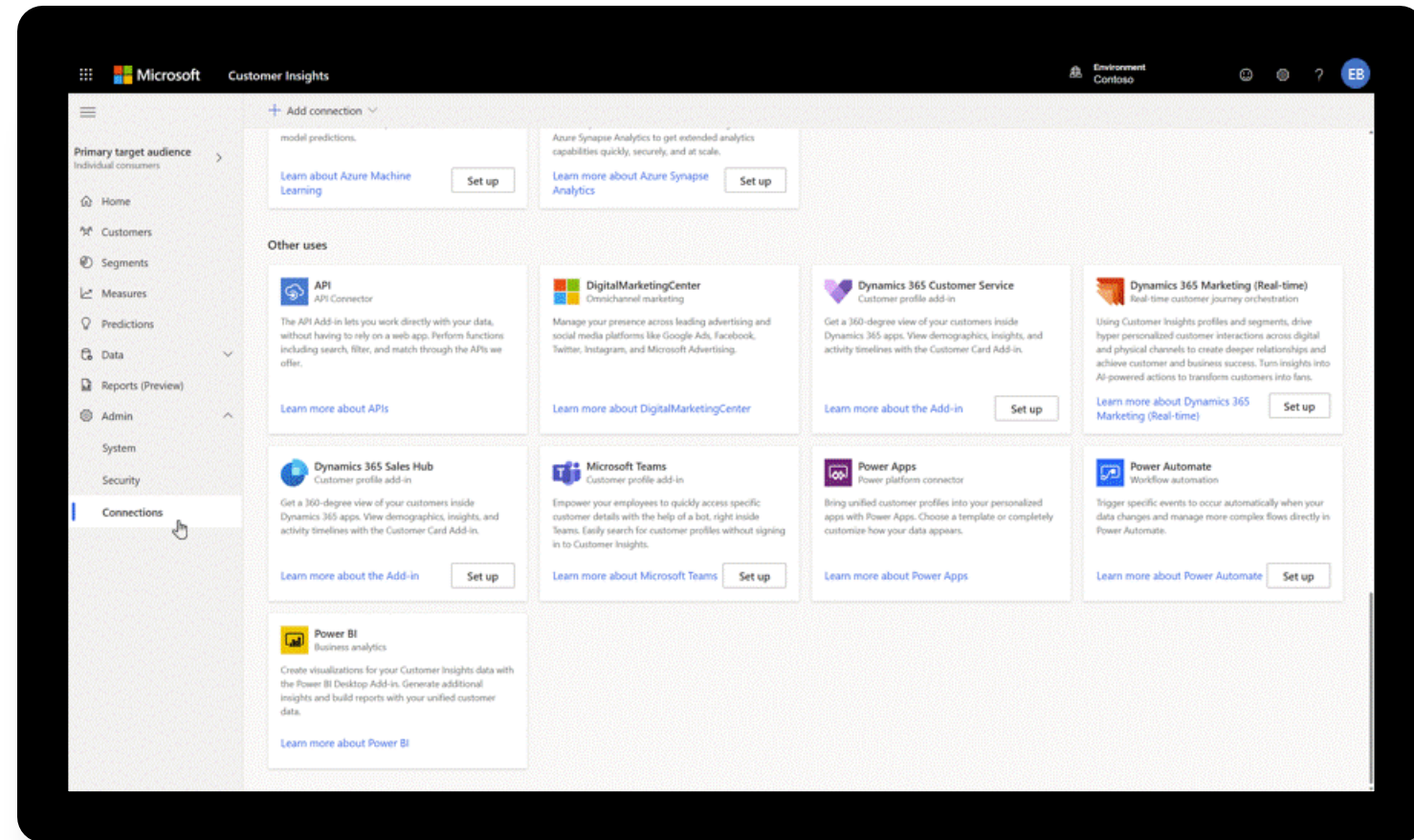
Low code
Democratized customization

Driven by AI

Use Power Automate to easily export segments to any third-party service

Easily export data to any MarTech or AdTech provider using Power Automate and custom connectors to make the most of your customer data.
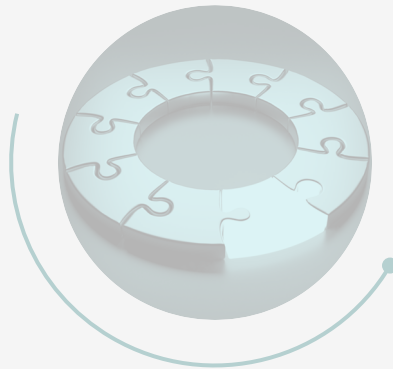
Microsoft Dynamics 365 Customer Insights

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Data first
Personalized Experiences

Collaboration
Connecting Sales and Marketing

Low code
Democratized customization

Driven by AI

Understand how your marketing activities contribute to your defined milestones

Identify and continuously improve performing activities by measuring which channels and messages have the greatest impact on your journey milestones.

- Define milestones based on key customer moments in your buyer's journey.

- Track the number of customers reaching these milestones over time.

- **Use AI-based attribution analysis to optimize** your marketing tactics, channels and journeys

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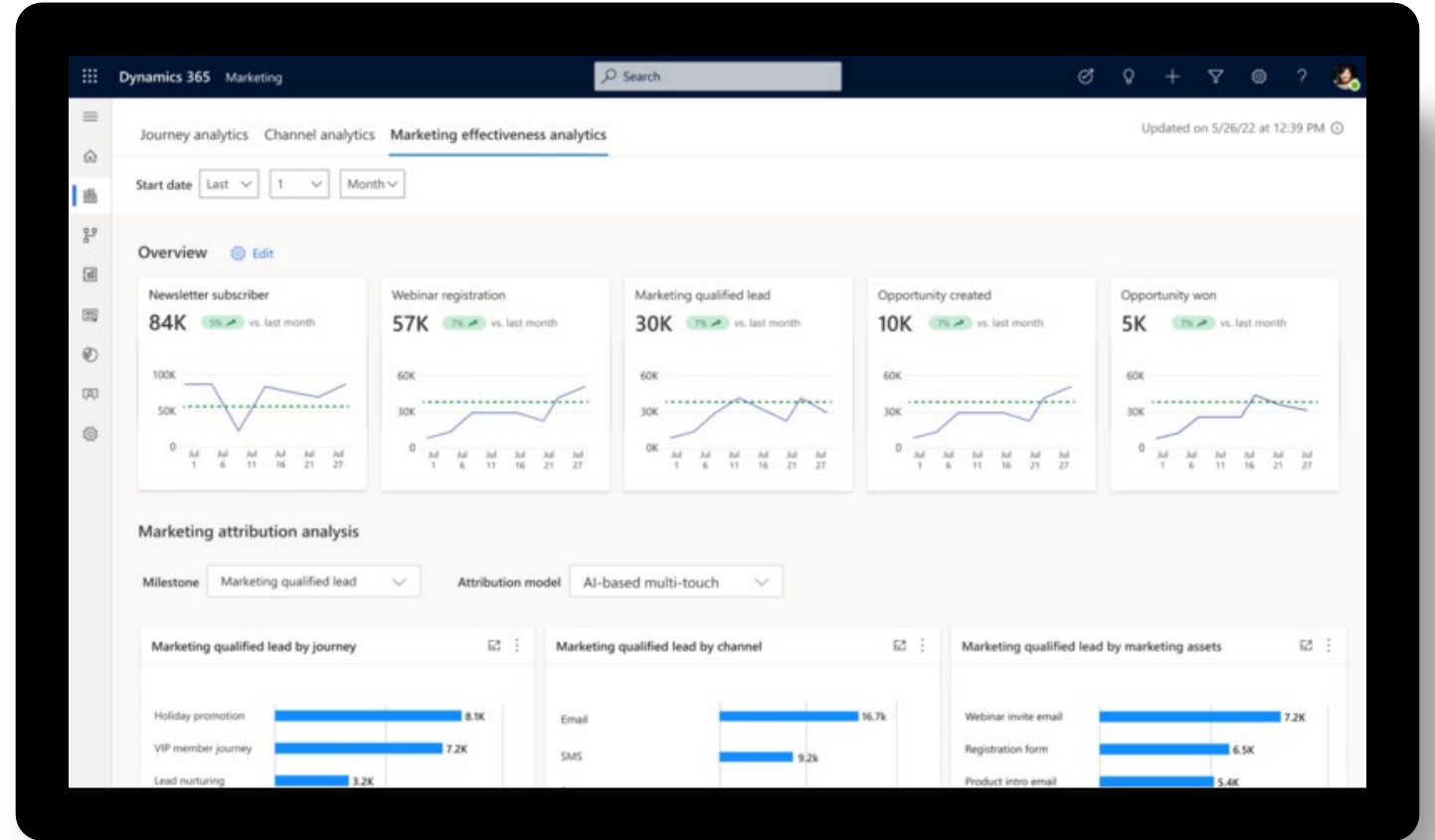
Maximize the value of your data

Understand your data quality more deeply to unlock better insights

- Data detection **automatically analyzes your imported data** and assigned an **overall data quality grade**

- Provides **detailed information on data quality issues** categorized by seven comprehensive data quality pillars with severity of impact, and impacted insights (segments, measures, or predictions)

- **Offers suggestions** to improve data quality to leverage all insights offered in Customer Insights

- Provides **upfront clarity on which predictions are suitable** for use based on your imported data
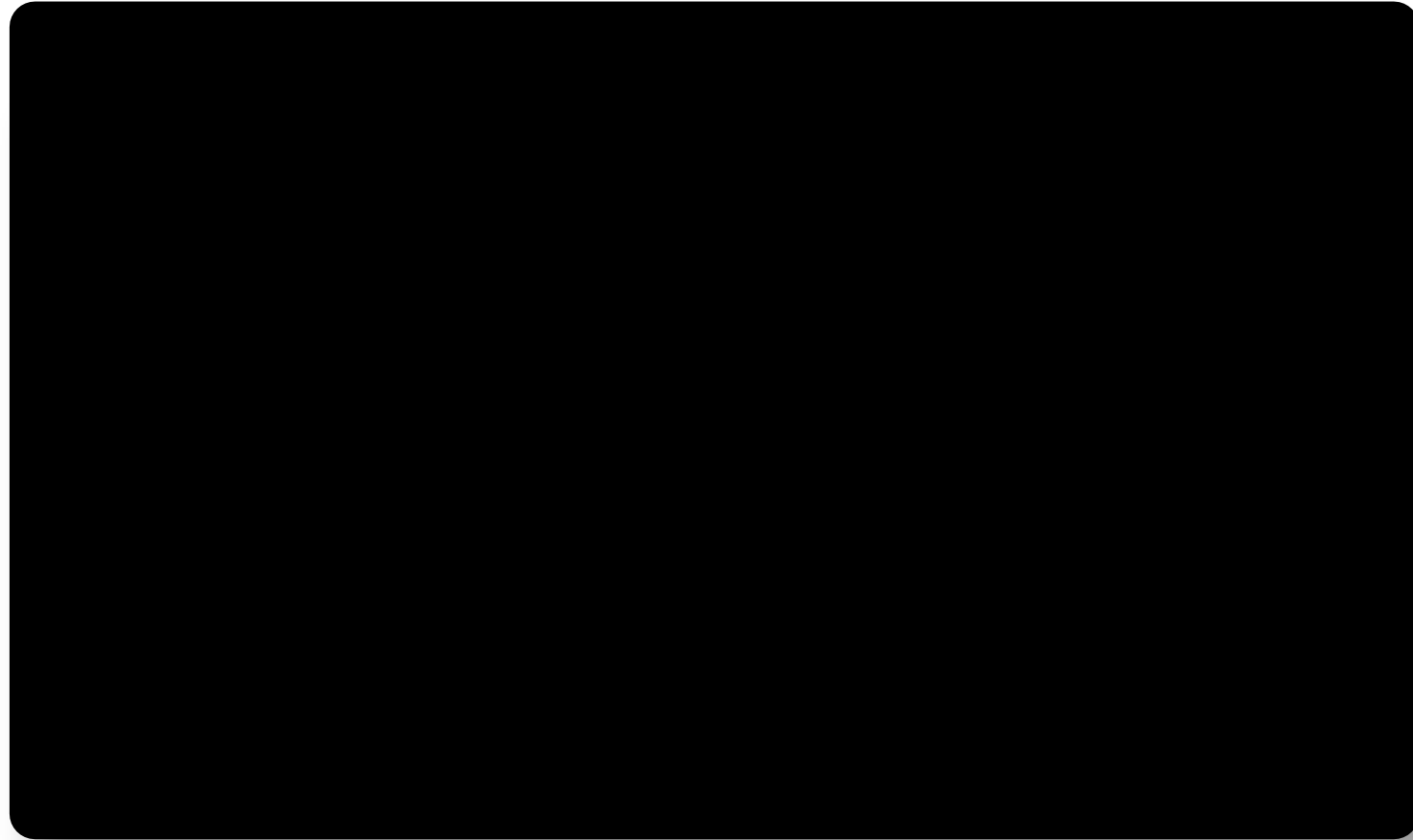
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Microsoft Dynamics 365 Customer Insights

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Unleash the power of custom predictive analytics
Easily add industry specific or proprietary predictive models to proactively engage customers

Quickly and seamlessly set up custom models in **Azure Synapse Analytics** and/or **Azure Machine Learning** *with business-user friendly, step-by-step guidance.*

- Name the custom model.

- Add the required data.

- Review the configuration.

- Run the model.

- DONE!
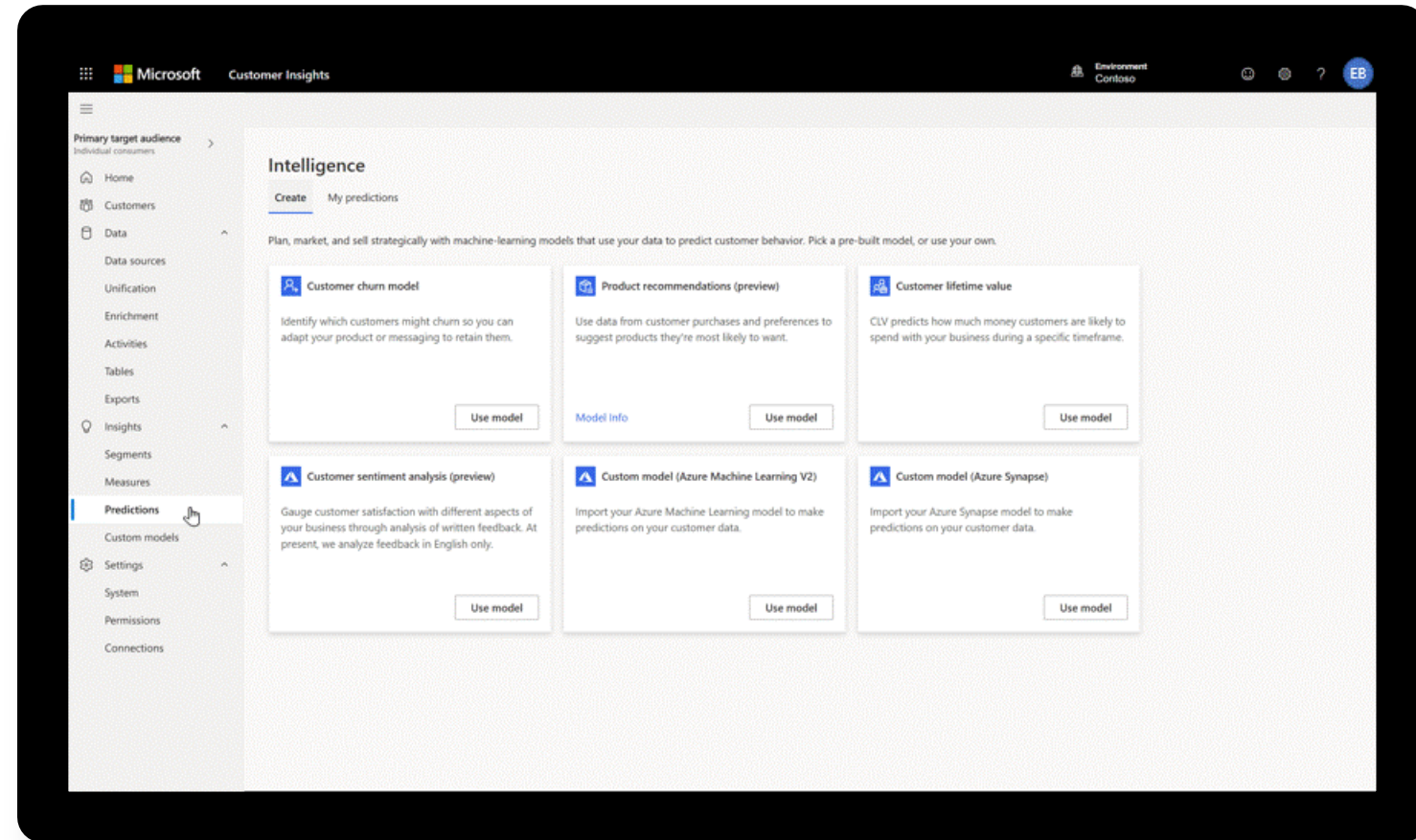
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Microsoft Dynamics 365 Customer Insights

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Thank you!

delegate

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