# D365 CUSTOMER INSIGHTS

Personalized experiences for business results

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### Pleased to meet you...



Sy Nayman

Director, Microsoft D365 Marketing Solutions

Prescribes and leads change in technology, people and processes so businesses can drive relationships online and at scale.



**Katie Schafer** 

Director, Consumer Product Solutions

Dynamics 365 product expert, focused on Microsoft D365 consumer solutions.



### Customer expectations have changed



64%

of customers will buy from socially responsible brands



20%

Increase in customer preference for contactless touchpoints



40%+

of consumers have increased digital media usage across desktop, mobile, social & streaming



### Meeting digital customer expectations

Brand Offer Consumer

Right offer, right time, right person is unlikely, even with keyword matched ad media and message automation.

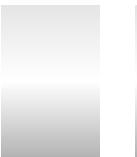
Big business is also competitive online: Amazon, Walmart, Best Buy

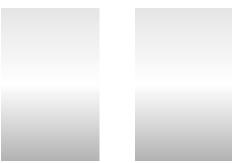


# Meeting digital customer expectations

Brand Offer Consumer









The offer can be timely and relevant when intent is known and the offer is targeted.



# Payout from personalization, timeliness and relevance

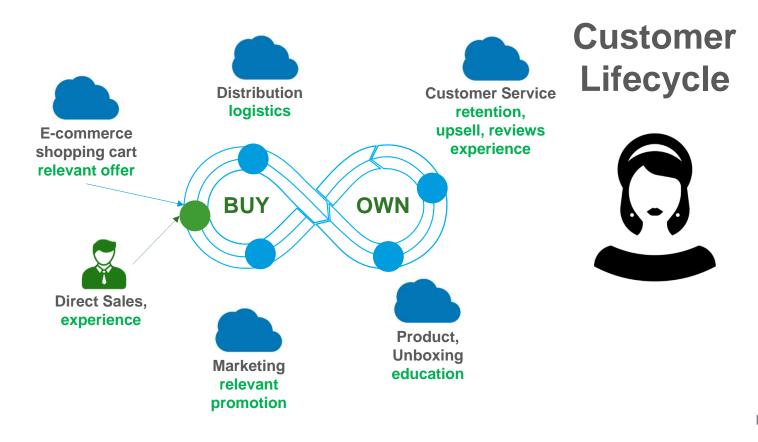
Brand Offer Consumer

The offer can be timely and relevant when intent is known and targeted. Transaction history can personalize the offer for increased relevance. Media attribution of transactions can target the message channel.





### Customer experience is enterprise wide





### Barriers to executing right message, time, place and person



Customer data sets are siloed.



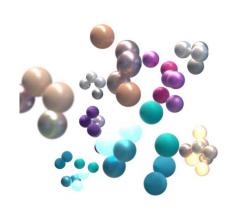
Systems of action are separated from customer data and normally operated from multiple departments.



Management of lists, segments and queries has required mature process and data talent across departments and lines of business.



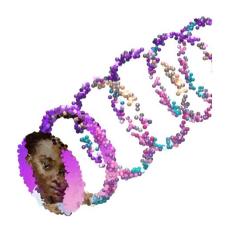
# D365 Customer Insights and D365 Marketing







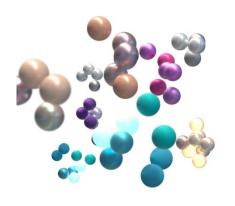
**Insights** 



**Action** 



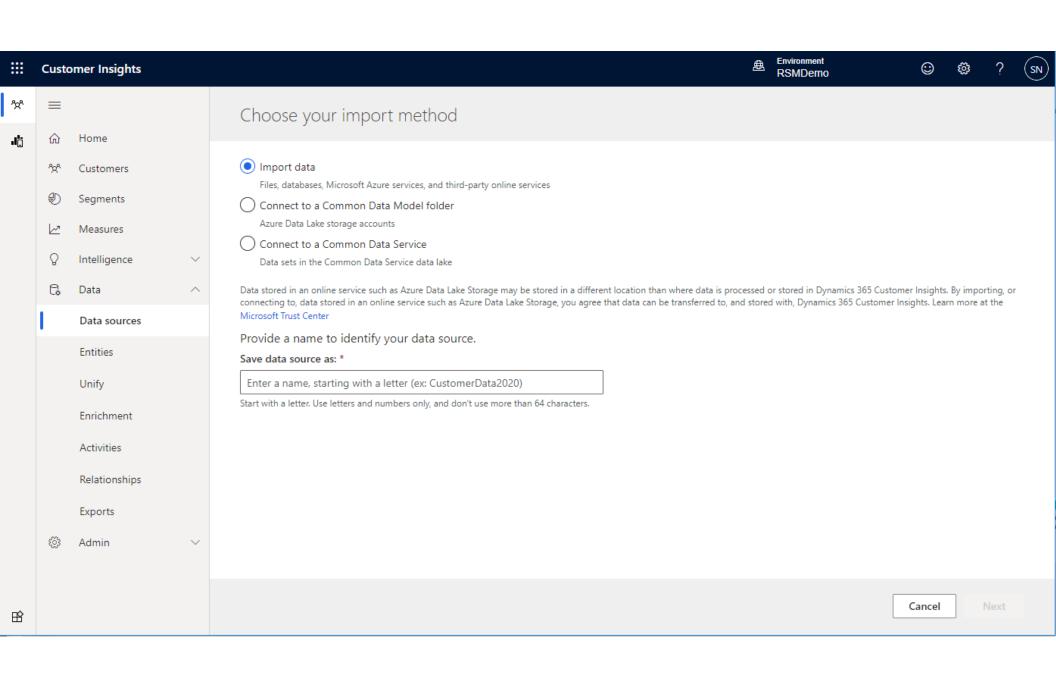
### Data sources and data connections

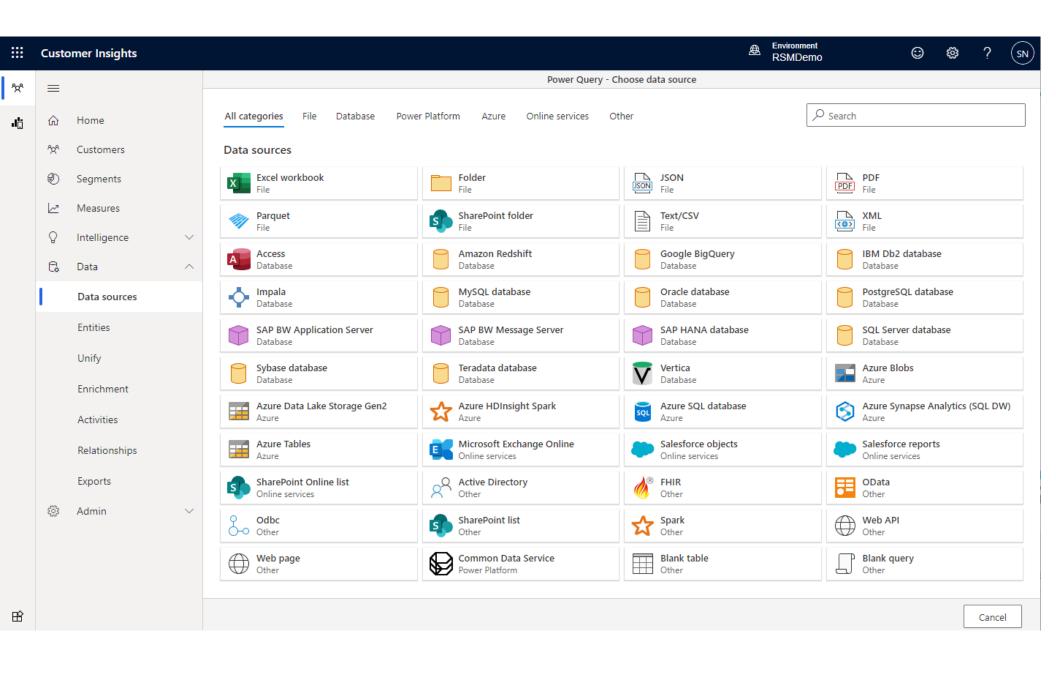


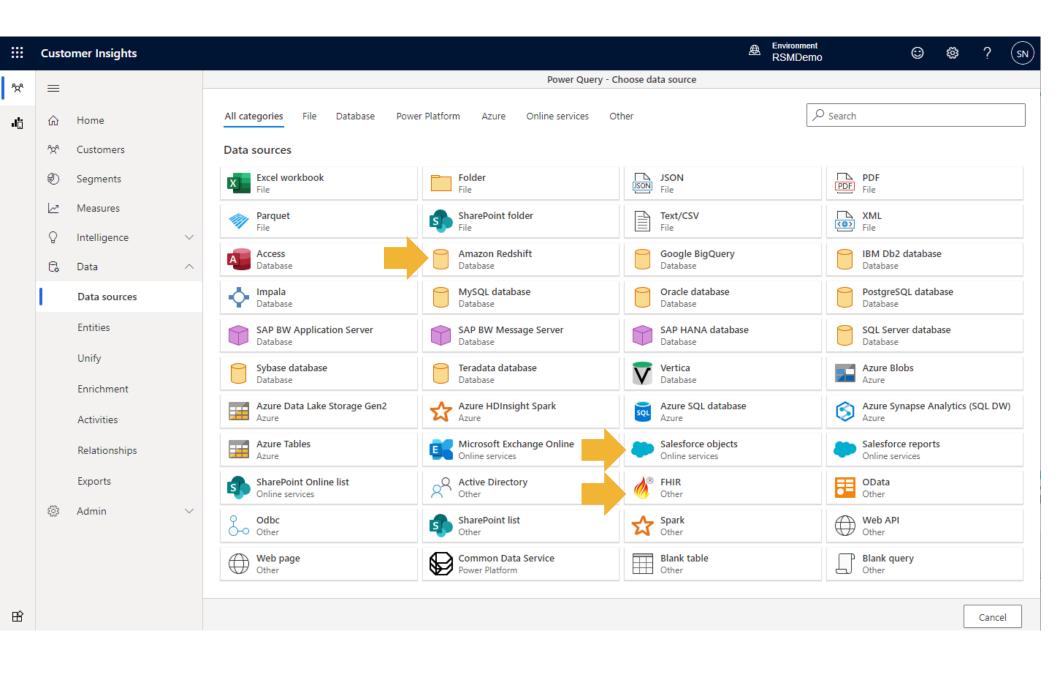
- Point of Sale
- Loyalty
- Web page visits
- Mobile application events
- Social link clicks
- Dynamics 365 Customer Engagement, e.g.,

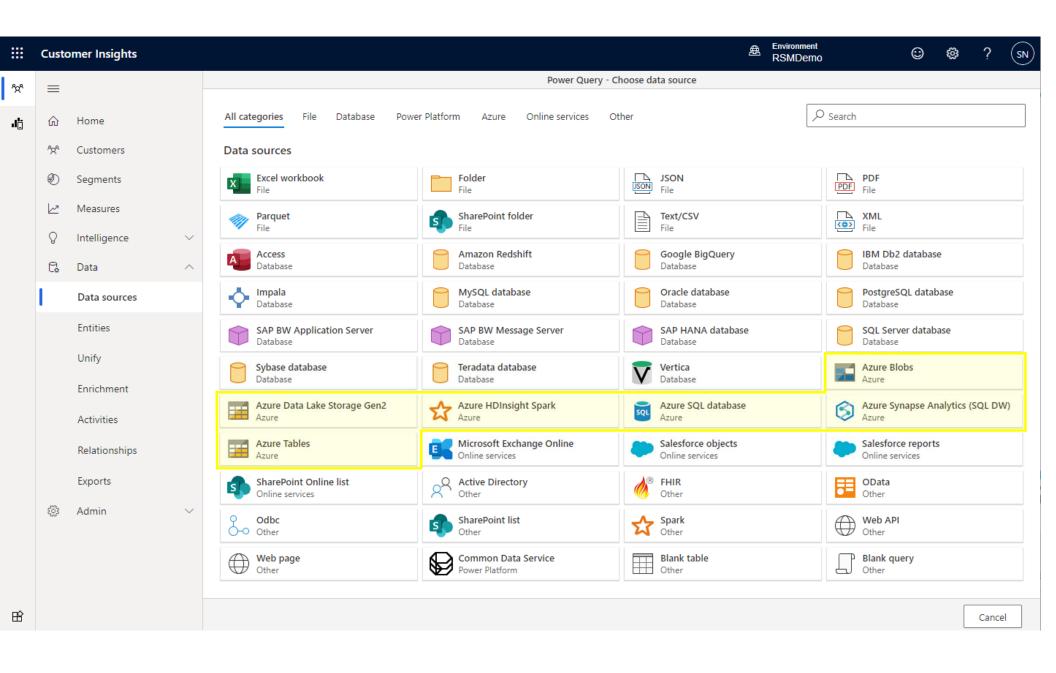




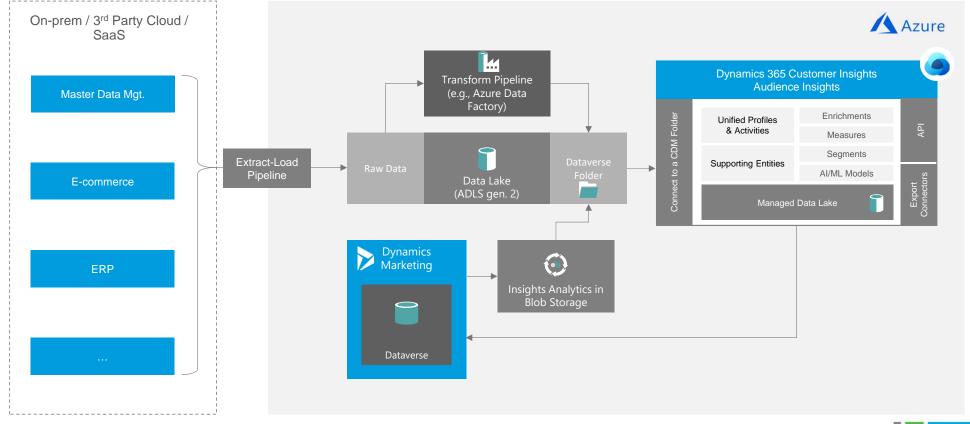






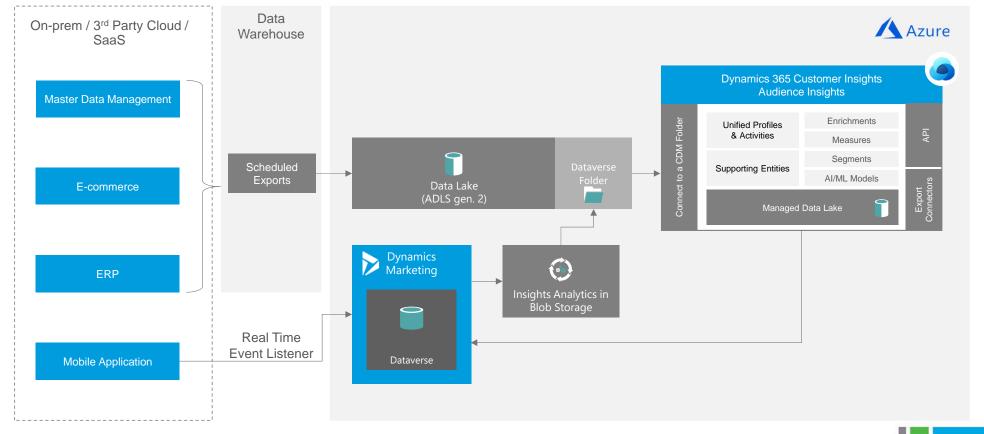


# Upstream data architecture: ETL, data staging

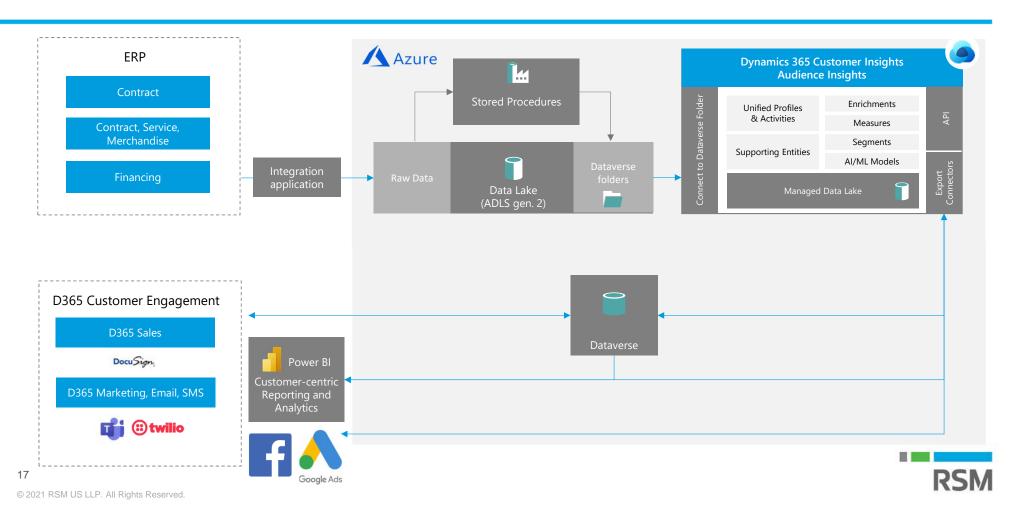




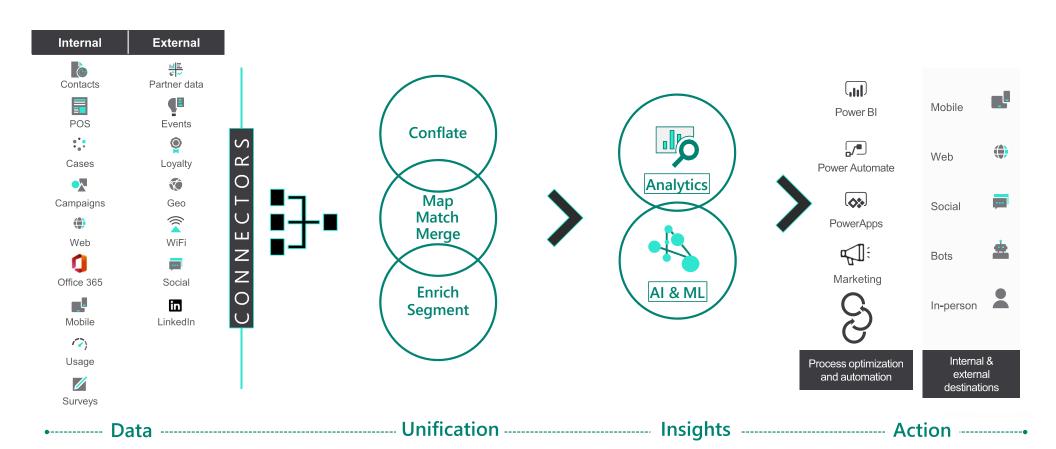
# Upstream data architecture: spoke off data warehouse



# Upstream data architecture, example



### **Customer Insights footprint**



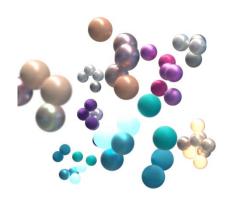
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# D365 CUSTOMER INSIGHTS, D365 CUSTOMER ENGAGEMENT MARKETING

**Demonstration Sequence** 



### Data sources and data connections

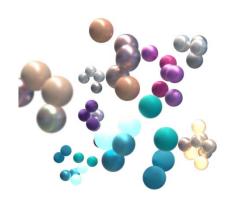


- Point of Sale
- Loyalty
- Web page visits
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- Dynamics 365 Customer Engagement, e.g.,





### Data unification: map match merge



- 1. Specify how to combine your data sets into a unified customer profile
- 2. Match the 'primary key' from one entity to the primary key of the other entities
- 3. Define rules and precision level to match the entities into a unified customer
  - Name + email or name + telephone
  - 'Dan Marshal' vs 'Dan Marshall'



# Insights and enrichment



- Audience insights, behavior as a data service
- Data enrichment, 3<sup>rd</sup> party data sources
- Al churn and next best offer



### Action, campaign orchestration



### **Action**

### Digital

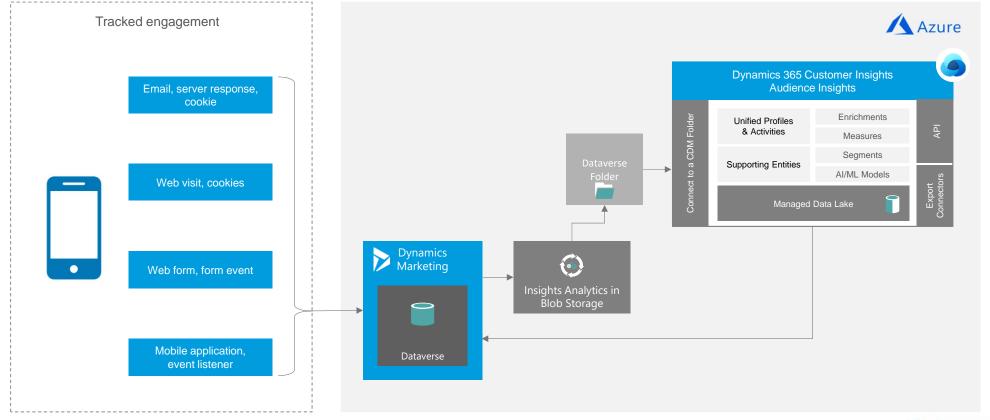
- Marketing campaign trigger
- Customer service
- Sales activity
- Events

### Omnichannel

- Email
- SMS
- Targeted display ad
- Mobile application push



# Merge D365 Marketing Engagement to Customer Profile





# QUESTIONS **AND ANSWERS**



# THANK YOU FOR YOUR TIME AND ATTENTION



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