

Deliver personalized customer journeys

Dynamics 365 Customer Insights



What we heard from you

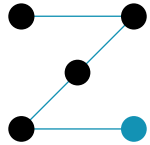
Challenges

- 1 <First point goes here>
- 2 <Second point goes here>
- 3 <Third point goes here>
- 4 <Fourth point goes here>

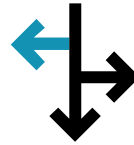
Priorities

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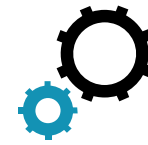
Delivering personalization at scale is hard to achieve



Disjointed customer
experiences



Siloed, disconnected
teams



Complicated, tedious
manual tasks

You need an **intelligent customer experience solution** that harnesses the power of generative AI and collaboration to efficiently meet evolving customer needs across marketing, sales, and service



Generative AI enables us to
reimagine customer experiences

Welcome to era of Copilot in customer experience

Dynamics 365 Copilot

AI as a real-time collaborator that

- ...enables more discovery
- ...generates fresh content ideas
- ...automates segmentation
- ...builds marketing campaigns
- ...completes work

Copilot in Dynamics 365 Customer Insights



Do more with less to deliver the customer experiences

“ We're able to do more productive work in terms of understanding the campaign itself. We can do AB testing now, to see what works, what's not working, why it's not working. Microsoft Dynamics 365 Customer Insights let us change direction when sales are lower than we want. ”

- Product Manager, CRM, CDP, Sports Organization



> 2X

Companies with high CX ratings achieve 2X more revenue growth¹

> 6 months
To payback

324%
ROI

\$7.86M
NPV to customers

Source for all statistics (unless otherwise footnoted): Results are over three years for a composite organization based on interviewed customers. [The Total Economic Impact™ Of Microsoft Dynamics 365 Customer Insights, a Microsoft-commissioned study](#) conducted by Forrester Consulting. May 2024.

¹Source: McKinsey & Company. Experience-led growth: A new way to create value. March 23, 2023.

The shift in customer experience is impacting everyone



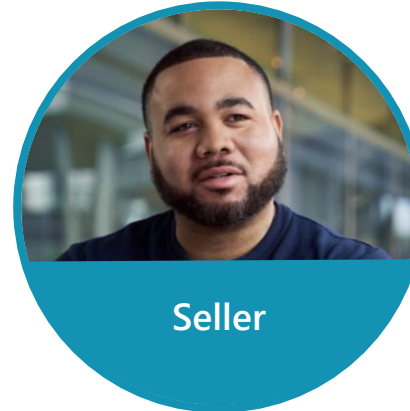
Data Wrangler

2%
Believe their CRM data is
accurate and consistent¹



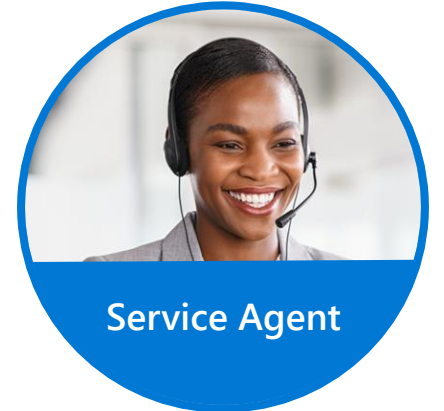
Marketer

49%
are implementing
generative AI in content
marketing²



Seller

85%
See value of AI tools in
proving real-time sales
insights³



Service Agent

61%
of customer service reps
say AI helps personalize
their interactions³

¹LinkedIn State of Sales Report. 2024

²Gartner. Gartner Generative AI 2024 Planning Survey. 2024.

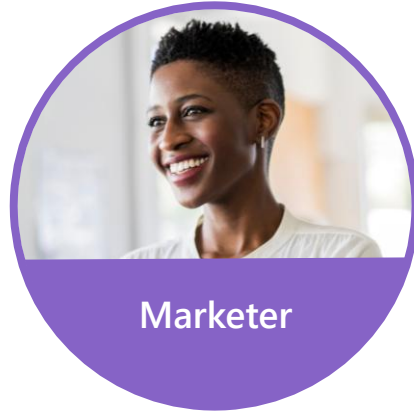
³HubSpot State of AI. 2024.

We hear from our customers that they need to



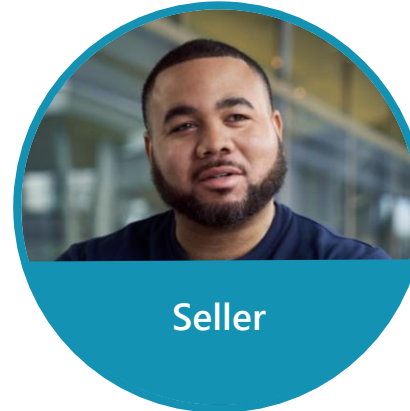
Data Wrangler

Unlock a single view
of customer with AI
assistance



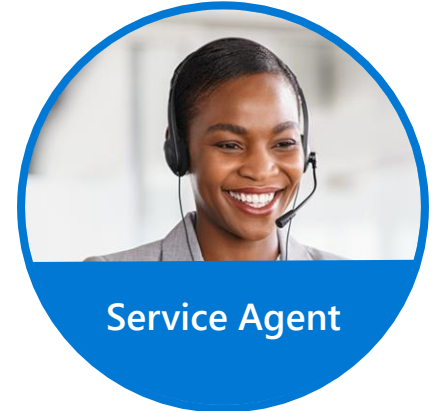
Marketer

Create relevant,
real-time customer
journeys at scale
using Copilot



Seller

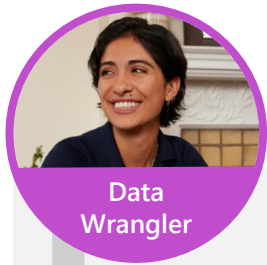
Enhance sales with
greater intelligence
and efficiency



Service Agent

Improve agent
insights and case
management

Microsoft Dynamics 365 Customer Insights



Data
Wrangler

Unlock a single
view of customer



Get a unified view
of customers



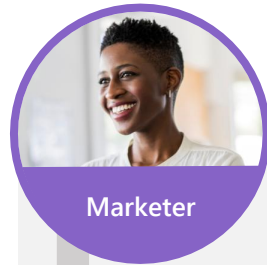
Pinpoint your
audience



Use predictive
insights



Track and
measure KPIs



Marketer

Create relevant,
real-time journeys



Build journeys
faster



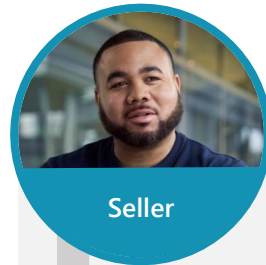
Personalize every
experience



Create new
segments



Nurture leads in
real time



Seller

Enhance sales
with greater
intelligence



Build a shared
vision



Close faster and
build loyalty



Continue the
conversation



Enable greater
visibility



Service
Agent

Improve agent
insights and case
management



Understand
customer context

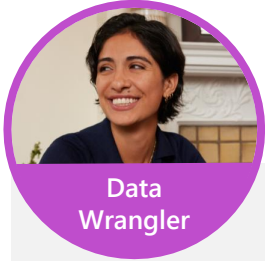


Stay up to date
on disruptions



Deliver personalized
service

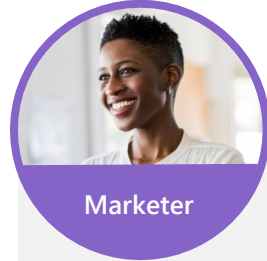
See how you can do more with less with Dynamics 365 Customer Insights



Data
Wrangler

15% improved conversion rate due better scoring, prioritization, and orchestration¹

25% time saved on customer journey maintenance and reporting¹

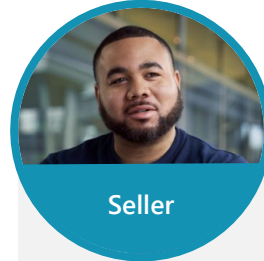


Marketer

75% time savings on customer journey development¹

50% reduction on physical marketing spend¹

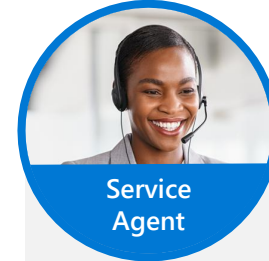
25% increase in total customer journeys created¹



Seller

15% increase in close rates¹

15% improvement in revenue per customer journey due to real-time customer data and AI guidance¹



Service
Agent

25% increase in customer journeys due to better knowledge of customer¹

50% time savings due to improved agent productivity¹

¹Results are over three years for a composite organization based on interviewed customers. The Total Economic Impact™ Of Microsoft Dynamics 365 Customer Insights, a commissioned study conducted by Consulting. April 2024.

Customer success for every industry



SIEMENS



BUSINESS
FINLAND



CAMPARI





Customer:
Sonepar

Industry:
Retailer (B2B)

Size:
10,000+ employees

Country:
France

Products and services:
Dynamics 365 Customer Insights
Dynamics 365 Sales
Dynamics 365 Customer Service
Azure Cloud Services
Azure Kubernetes Service

[Read full story here](#)



“With this platform, we are able to transfer data regarding customer needs and requests between teams, measure the service provided to our customers and the time taken to resolve problems.”

— Denis Ravel, CRM Director, Sonepar

Situation:

As the leading supplier of electrical products, they aimed to "remain a world leader in an industry that is becoming digitalized" says CTO Jérémie Profeta.

To achieve this, Sonepar relied on Microsoft's technologies and ecosystem of partners to keep them competitive.

Solution:

Created an omnichannel experience, called Spark, a unified platform powered by Dynamics 365, to offer a seamless and consistent experience.

Dynamics 365 Customer Insights, Sales, and Service were used to ensure each customer segment could benefit from a tailored experience

Impact:

- The Spark platform is receiving good feedback and is widely adopted by associates, 90% of whom say they use it every week.
- 95% of revenues are now in the Azure data lake, which means more visibility on transactions, customer, product, channels, manufacturers.



Customer:
Kodak Alaris

Industry:
Discrete Manufacturing

Size:
1,000 – 9,999 employees

Country:
United States

Products and services:
Dynamics 365 Customer Insights
Dynamics 365 Customer Service
Microsoft Teams
Outlook

[Read full story here](#)



“Not only did implementing Microsoft Dynamics 365 Customer Insights lead to high-cost savings through consolidation but we have also seen improved efficiency and are better able to respond to customer needs.”

—Iva Kanova-Divinnie: Global Marketing Automation Manager, Kodak Alaris

Situation:

When Kodak Alaris was divested from Eastman Kodak Company, the newly formed business implemented a range of CRM and marketing automation solutions, but multiple solutions and vendors made it difficult to gather insights and drove up costs.

Solution:

Kodak Alaris addressed these issues by consolidating on to Microsoft Dynamics 365. The goal was to gain a holistic view of customers, improve collaboration between sales and marketing teams, and improve efficiency.

Impact:

Today, the business enjoys greater visibility into customer journeys and improved efficiency, while **saving 61% of costs compared to their previous solutions.** And the business is using Copilot in Dynamics 365 Customer Insights to streamline tasks and save time.



Customer:
Northrop & Johnson

Industry:
Retailers

Size:
Medium (50-999 employees)

Country:
United States

Products and services:
Dynamics 365 Customer Insights
Dynamics 365 Sales
Dynamics 365 Copilot
Power BI

[Read full story here](#)



“The new Copilot capabilities in Dynamics 365 Customer Insights are a game changer. We expect they will fundamentally transform our marketers’ workflow—helping us save time, boost productivity, and enrich the quality of engagement with our customers.”

—Keith Perfect, Director of Technology & Intelligence, Northrop & Johnson

Situation:

The superyacht business—where Northrop & Johnson is the world’s leading broker—is about making dreams come true and catering to a small group of high-value clients worldwide.

Solution:

The company embraced digital transformation, giving it a competitive edge and keeping it at the top of its field.

Impact:

Deploying Dynamics 365 Customer Insights and Sales has led to a 250% increase in charter bookings. The average close rate in year-over-year brokerage sales grew 20% and 23% in 2021 and 2022, respectively.



Customer:
NC Fusion

Industry:
Nonprofit

Size:
1 – 49 employees

Country:
United States

Products and services:
Dynamics 365 Customer Insights
Dataverse
Power BI
SQL Server

[Read full story here](#)



“Rolling out the Microsoft solution was easy. I rolled out Dynamics 365 Customer Insights all at once with no hiccups.”

— Chris Barnhart, Head of IT and Data Systems, NC Fusion

Situation:

North Carolina-based sports club NC Fusion needed to scale up its marketing campaigns to feed the growth of its diverse sports programs. The club had no unified view of its marketing campaign data. Producing email and newsletter content, in addition to creating audience segments, was laborious and time-consuming.

Solution:

Using Copilot with the customer data platform and journey orchestration applications in Microsoft Dynamics 365 Customer Insights delivered results for NC Fusion. The club enjoys higher content productivity and increased engagement with its greater mission.

Impact:

With Copilot, the time to create campaign deliverables decreased by 75 percent, customer engagement increased by 200 percent, and journey creation time decreased from one hour to 20 minutes. The club was able to create campaign content 75 percent faster using query assist capabilities in Copilot for Dynamics 365.

LYNK & CO

Customer:
Lynk & Co

Industry:
Automotive

Size:
Medium (50-999)

Country:
Sweden

Products and services:
Dynamics 365 Customer Insights
Dynamics 365 Sales
Dynamics 365 Field Service
Power Platform

[Read full story here](#)



“Microsoft Dynamics 365 was the only platform that was a great mix right out-of-the-box. With its customizable tools we could create the correct processes to support the high level of complexity and flexibility needed to deliver our unique customer experiences.”

—Jaime Cerejeira, Head of Customer Engagement Platform, Lynk & Co

Situation:

With a mission to change mobility forever through car subscriptions and sharing, Lynk & Co needed a customer engagement platform that could support a complex infrastructure while driving highly personalized customer experiences and community building,

Solution:

The company chose Microsoft Dynamics 365 for its out-of-the-box, customizable tools, and the ability it provided to build in modules, and create unique processes to prioritize specific customer experiences.

Impact:

Lynk & Co. was able to ramp up a significant presence in Belgium, France, Germany, Italy, Netherlands, Spain, and Sweden within just eighteen months.

CAMPARI GROUP

Customer:

Campari Group

Industry:

Consumer Goods

Size:

1,000 – 9,999 employees

Country:

Italy

Products and services:

Azure

Dynamics 365 Customer Insights

Power Apps

Power BI

[Read full story here](#)



“We want to extend experience beyond taste and flavor. The moments we build with consumers—whether it be in our brand houses, in the home, or through a digital device—is where we want to engage and grow consumer experiences with our brands. Doing that at scale with the right balance and permission, while learning as the organization matures, is the advantage we have had from day one with Dynamics 365.”

—Chad Niemuth, Vice President Global IT, Campari Group

Situation:

Campari Group, topping \$2 billion in revenue in 190 countries, is on a digital path to create optimal, personalized relationships with consumers.

Solution:

Campari launched CRM capabilities via Dynamics 365 Customer Insights with personalized real-time journey workload, Power Apps and Power Automate, all tailored for local, regional, and global needs.

Impact:

- Stronger, richer consumer profile database informing more personalized journeys
- Cultural shift in data-centric decision-making based on more personalized, more successful campaigns
- Capability to capture data in person and use immediately to inform next best actions on customer journeys



Customer:
California State University San Marcos

Industry:
Higher Education

Size:
1,000-9,999 employees

Country:
United States

Products and services:
Microsoft Dynamics 365
Copilot for Dynamics 365
Dynamics 365 Customer Insights

[Read full story here](#)



"What the university can do with Dynamics 365 and the power of AI is curate and centralize data. We are bringing meaning to data chaos."

—Tony C. Chung, Chief Information Officer, California State University San Marcos

Situation:

To meet the diverse needs of its students, and to maintain its dedication to their university experience, California State University San Marcos needed a strategic and campus-wide plan to connect siloed and disconnected systems while empowering its staff with efficient communication tools.

Solution:

Using Dynamics 365, CSUSM is streamlining processes and standardizing data while staying focused on the experiences of students, faculty, and the community. It handles school events and recruitment through Customer Insights and AI, creating consistent but customized communications.

Impact:

Through its use of Customer Insights and AI, CSUSM has been able to better understand and personalize the student journey—from recruitment through graduation and beyond.



Customer:
Natuzzi

Industry:
Furniture

Size:
1,000 – 9,999 employees

Country:
Italy

Products and services:
Dynamics 365 Customer Insights
Dynamics 365 Sales
Power Platform
Power BI

[Read full story here](#)



“Our digital and marketing professionals can now manage data analysis and segment creation without the help of IT to continuously evolve our digital strategy.”

— Pierangelo Colacicco, Chief Information Technology and Digital Innovation Officer, Natuzzi

Situation:

Natuzzi has seen rapid global expansion and is broadening their customer base to expand to online-first buyers. While their roots are in their in-store personalized experience, their overall goal is to bring harmony to every customer no matter how they interact.

Solution:

Natuzzi’s solution incorporated the use of Dynamics 365 Customer Insights to provide a wholistic view of customers from their previously disconnected systems and provide an end-to-end system capable of delivering a harmonious experience.

Impact:

- Collects the same customer data in just 4-5 days that had taken two years
- 68% increase in the number of unified customer profiles in the last two years
- Common language for the marketing team to run targeted campaigns; personalized offers to customers from the sales team; and, full customer history for better service



Customer:

Leatherman Tool Group

Industry:

Consumer Goods

Size:

50–999 employees

Country:

United States

Products and services:

Microsoft Dynamics 365

Microsoft Dynamics 365 Customer Insights

Microsoft Customer Experience Platform

[Read full story here](#)



“Having lots of data doesn’t provide value unless you’re able to stitch it all together, so it’s important that we have Dynamics 365 Customer Insights to unify all of our data and help us do something valuable with it.”

—Kevin Gleason, Global Brand and Marketing Director, Leatherman Tool Group

Situation:

A leading force in the tools industry, Leatherman wanted to improve its e-commerce capabilities and offer personalized, cross-channel buying experiences. It first needed the ability to better predict customer buying behaviors and maximize data insights.

Solution:

Leatherman worked with partner Avtex to transform customer engagement with the Microsoft Customer Experience Platform, introducing a customer data platform and engagement orchestration with Dynamics 365 Customer Insights.

Impact:

- Enhancing the company’s understanding of unique customer journeys
- Developing closer customer connections and ensuring satisfaction
- Using data to reach new customers and grow the brand

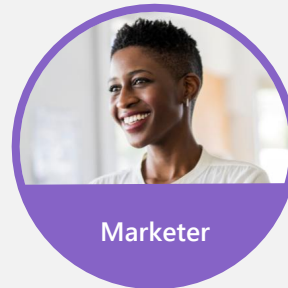
Use Customer Insights however you need it

Start where you want



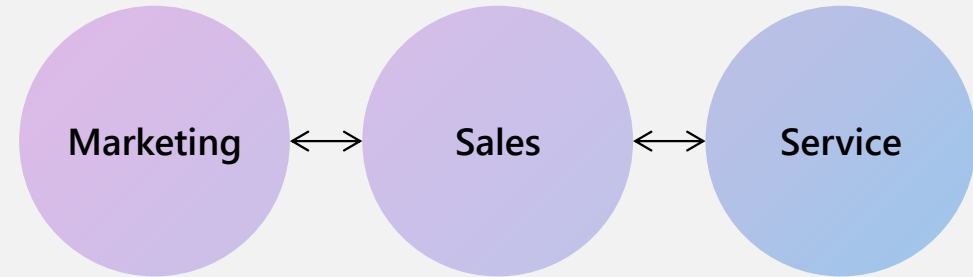
Customer Data
Platform (CDP)

and/or



Customer Journey
Orchestration (CJO)

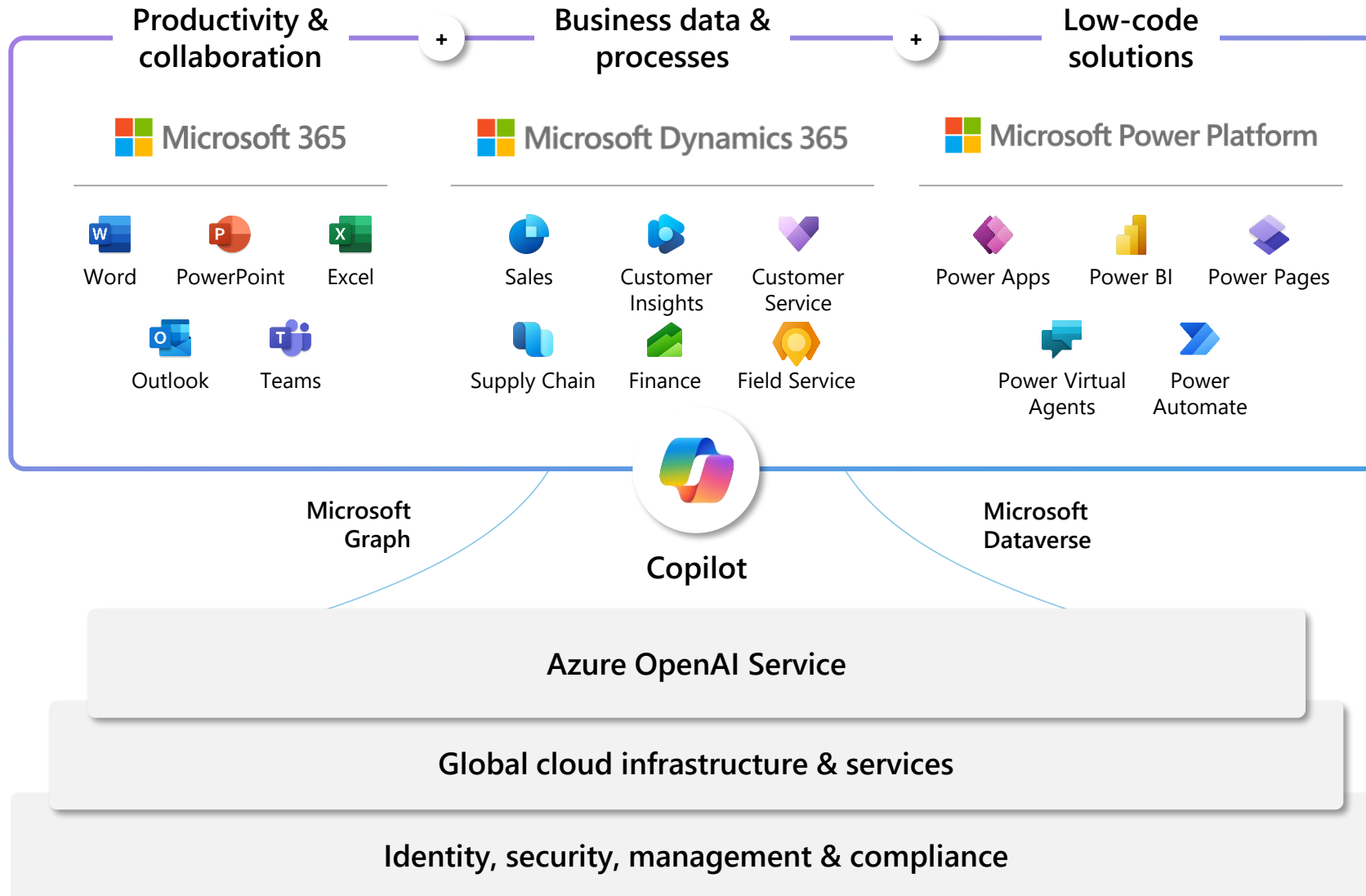
Connect where you want



Buy what you want

40% savings on base license offer compared
to our previous packaging

The blueprint for cross-organization impact



A Leader in CRM Software

FORRESTER®

The Forrester Wave™: Customer Relationship Management Software, Q1 2025

March 2025

[Read the report](#)

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FORRESTER

The Forrester Wave™: Customer Relationship Management Software, Q1 2025

The 12 Providers That Matter Most And How They Stack Up

FIGURE 1

Forrester Wave™: Customer Relationship Management Software, Q1 2025

THE FORRESTER WAVE™

Customer Relationship Management Software

Q1 2025



*A halo indicates above-average customer feedback. A double halo indicates that the vendor is a Customer Favorite.

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Microsoft expertise to achieve business outcomes

Enable and optimize your Dynamics 365 solutions with outcome-based engagements

What you want to achieve...



Ensure deployment and implementation of Dynamics 365 solution is successful



Reduce risks in the implementation project



Help teams navigate new solution implementation successfully



How we deliver...

Assess current environment, analyze issues and risks, and workshop to ensure successful go-live

Technical and functional guidance, risk identification, and mitigation to help de-risk the project

Knowledge transfer sessions, coaching, and deep training to prepare your teams for deployment and optimization of Dynamics 365 with AI Copilot



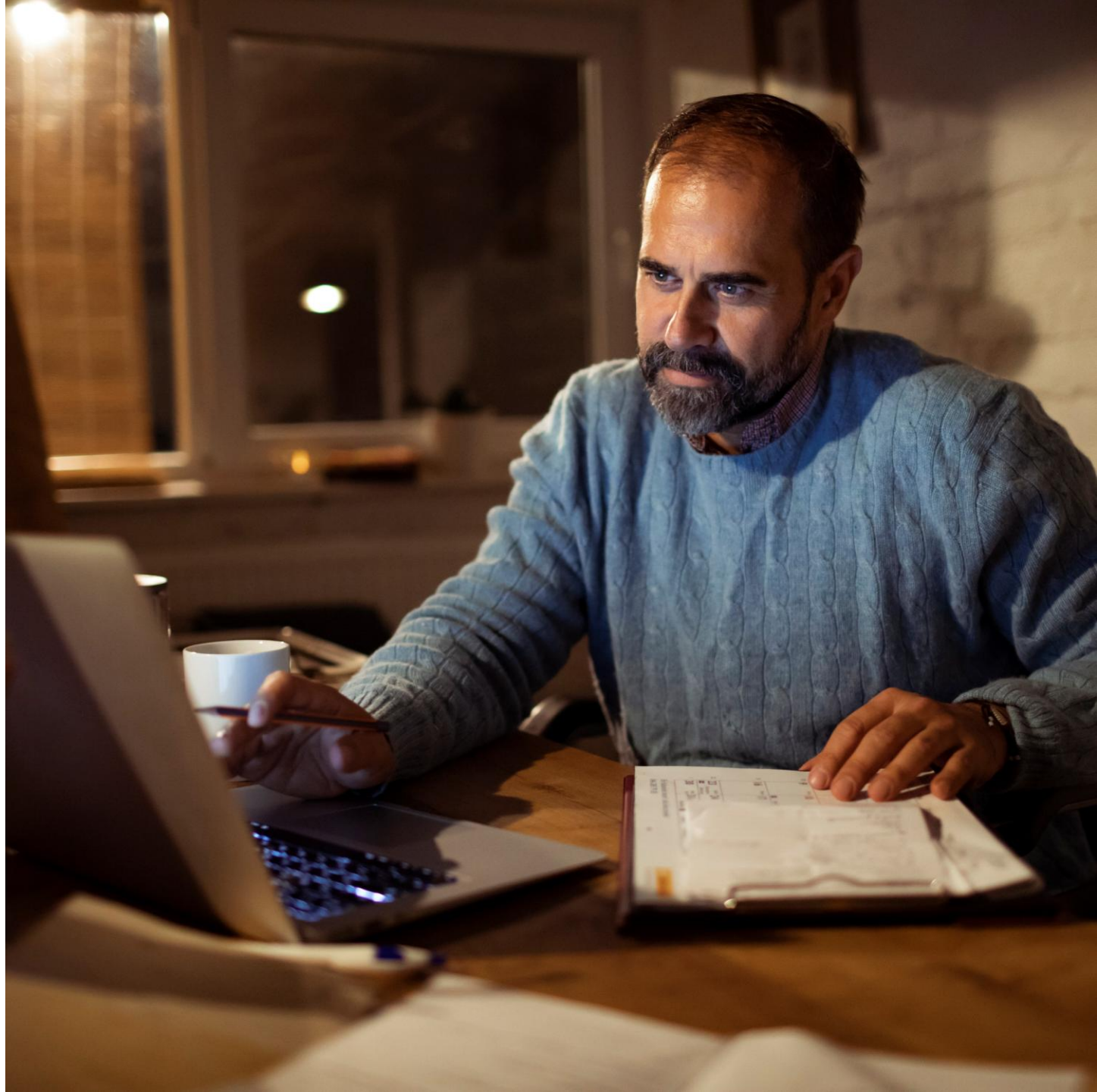
Let's get started

1. **Imagine** what a future state could look like with our **Vision and Value Workshop**
2. **Quantify** the value of your business transformation with a **customized TCO and Business Value Assessment**
3. **Ensure** buy-in across your organization with a **tailored immersive experience**



Thank you

Capabilities



Unlock a single view of customer with AI assistance

- Get a unified view of customers
- Pinpoint your audience
- Use predictive insights
- Track and measure KPIs



AI-assisted single view of customer

Get a unified view of customers

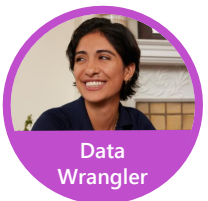
Get a unified view by bringing together transactional, demographic, and behavioral data, in real-time, with prebuilt connectors



Speed up data unification using Copilot to get recommended unification rules

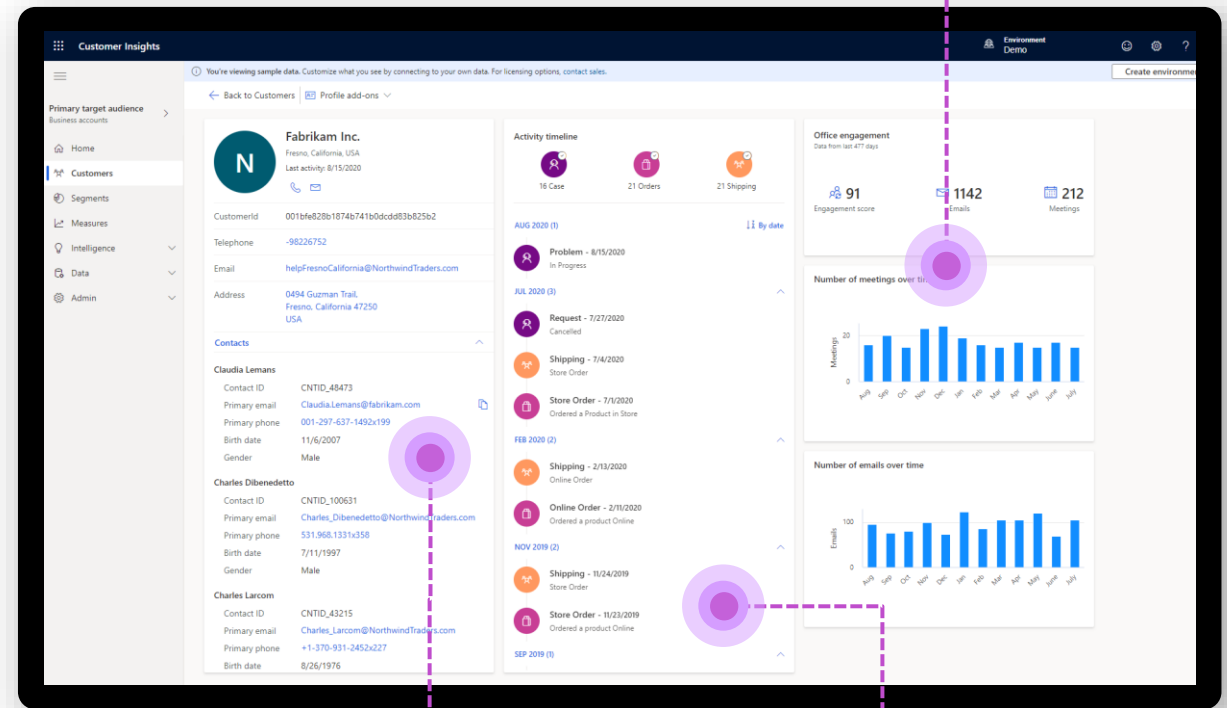
Create deeper connections by powering actions informed by profile attributes

Honor customers preferences using built-in consent and compliance controls across experiences



Data
Wrangler

Unify and understand engagements end-to-end



Connect individual contacts to accounts for more effective activation

Develop real-time understanding of customer journeys

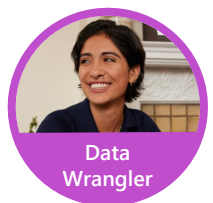
AI-assisted single view of customer

Pinpoint your audience

Discover new audience segments using everyday language with Copilot

Dynamically update segments based on triggers or schedules

Define rich segments for more targeted marketing and sales actions



Use natural language to query your customer data with Copilot

Ask a question about your customers

Use natural language to ask questions about your customers. If you are not familiar with your data sources, just say "Explain table structure and entities for my data"

How many of my VIP consumers have a high influencer score and are likely to attend an event in New York City?

Results

There are 1,277 consumers in New York City that have a high influencer score and are likely to attend an event in New York City as based on previous event attendance.

Did you know?

The average age of this segment is 28.9 years old. This group attended 2.3 events on average in the last 2 years and 32.7% have purchased a bourbon product during this same period.

Explore further

How many bar owners in New York City participated in Negroni week last year?

How many customers in New York City have a lower overall order volume in the last 3 months compared to previous order history?

See more examples

Verify your results with SQL

```
1 SELECT c.C
2 FROM Consu
3 INNER JOIN
4 INNER JOIN
5 WHERE a.Ac
6 AND a.Entl
7 AND i.Infl
```

Get rich insights about your customers and prompts on how to discover more

AI-assisted single view of customer

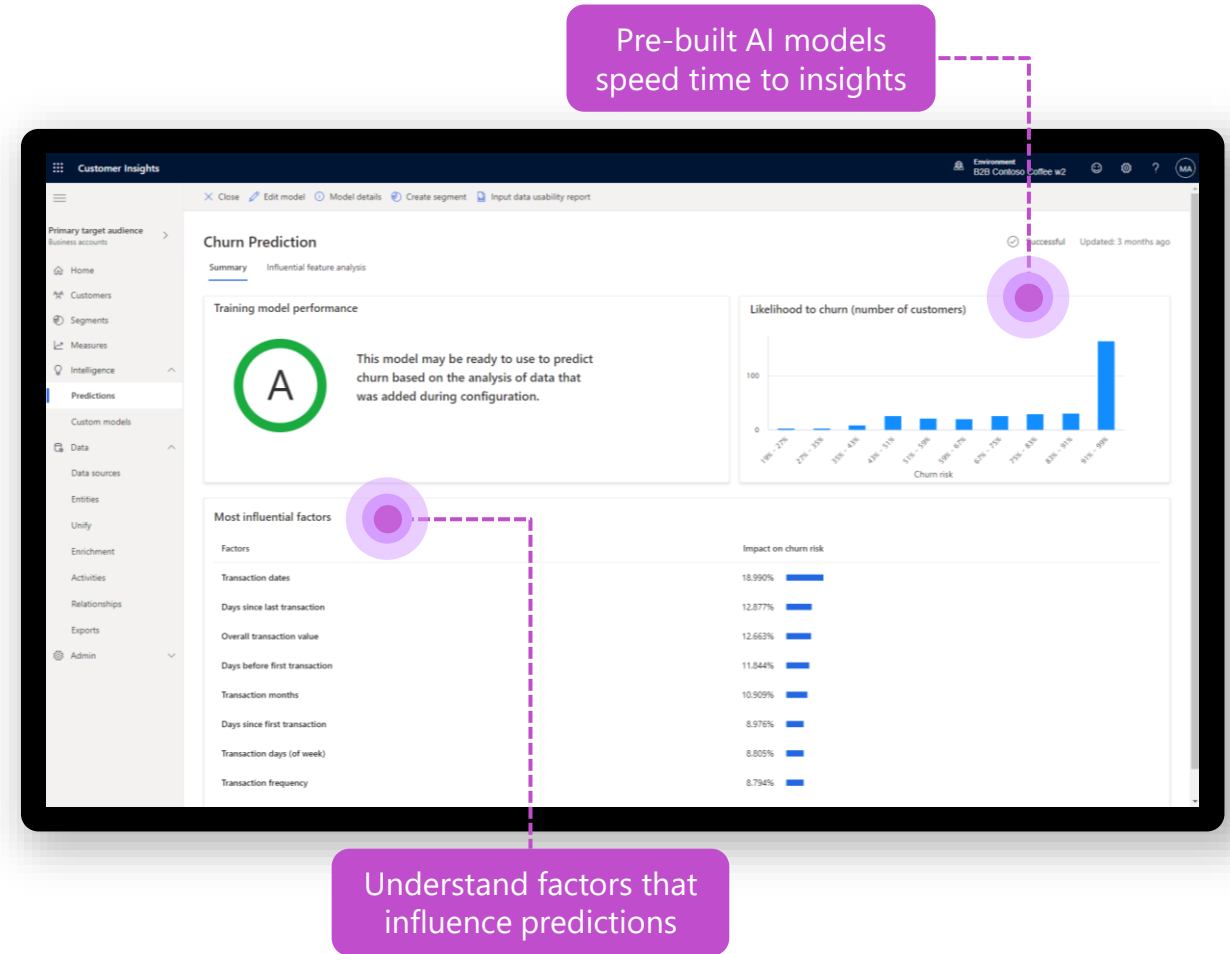
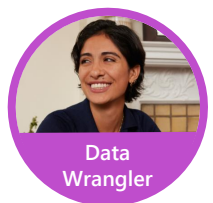
Use predictive insights

Acquire knowledge fast using powerful out-of-box AI models

Develop a deep understanding of factors driving predictions

Personalize marketing activities with AI-driven recommendations

Train AI models with customer consent data to ensure activities preserve proper consent



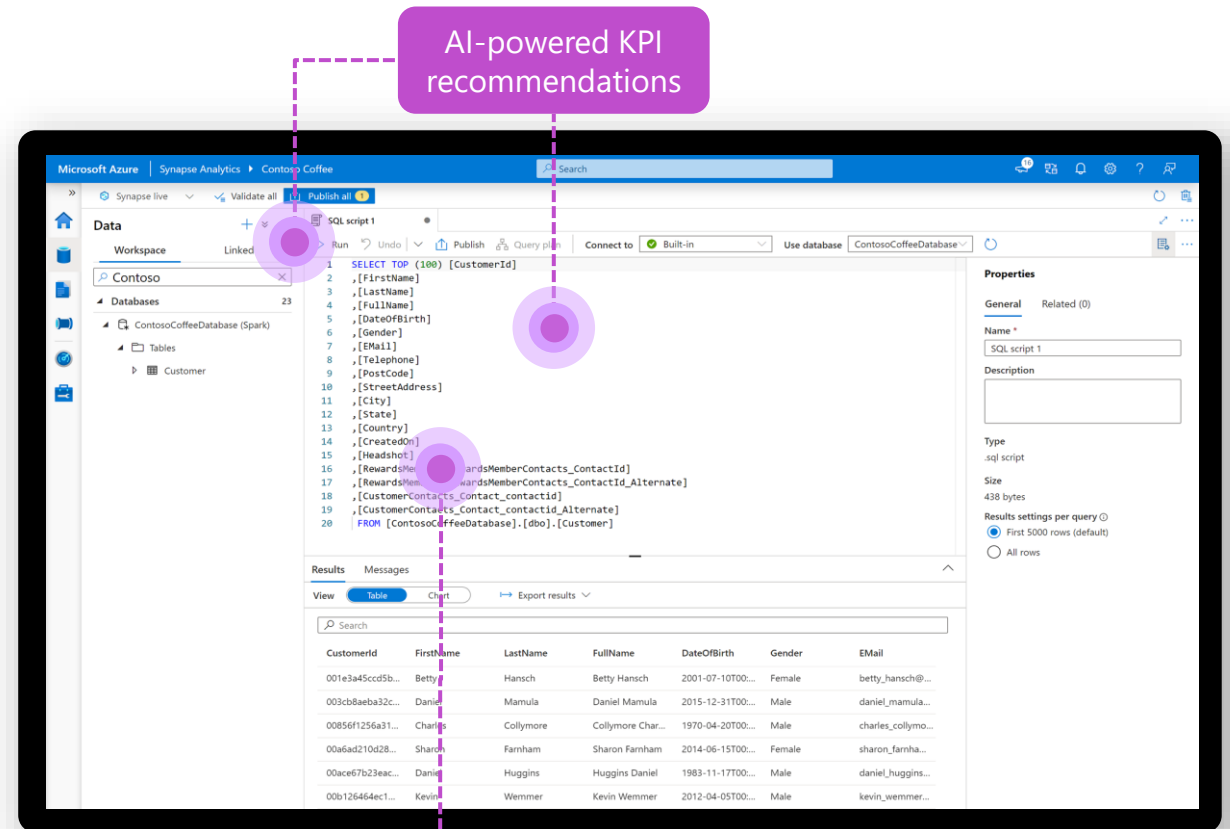
AI-assisted single view of customer

Track and measure KPIs

Define KPIs unique to your business with the help of AI

Get faster time to insights with no code query builder

Rapidly build, test and deploy custom AI/ML models using advanced analytics



Create relevant, real-time customer journeys at scale

- Build journeys faster
- Personalize every experience
- Create new segments
- Nurture leads in real time



Relevant, real-time journeys

Build journeys faster

Create journeys with Copilot using simple descriptions on goals, targets, or desired flow

Use customer-led triggers to respond to their actions and convert interest to sales

Implement A/B tests to identify the highest performing content or journey branch

Deeply understand journey, channel, and content performance with built-in dashboards



Marketer

Track, edit, and update the whole journey

Create journey with Copilot

Targeting the loyalty members, send a promotion email and follow up based on email link clicked.

See more examples

When customers abandon cart, send reminder message and post purchase follow-ups

Here's the journey. After reviewing it, you can select Create journey to start building it.

Abandoned cart journey

- Journey will start when a contact abandon cart
- Send them a reminder email
- If they complete the purchase, send a Thank you email
- Wait for 3 days
- Send them a Campaign email
- Contact will exit the journey
- If they don't complete the purchase, contact will exit the journey

Create journey Preview

Describe your customer journey in everyday words

Abandoned cart journey

Trigger: Cart abandoned | Audience: Contact

Entry

Cart abandoned

Send an email

E.g. Reminder email

When branch

E.g. Purchase completed

Yes No

Send an email

E.g. Thank you email


Wait 3 days

Create manually Cancel


Direct Copilot to create the journey you need

Relevant, real-time journeys

Personalize every experience

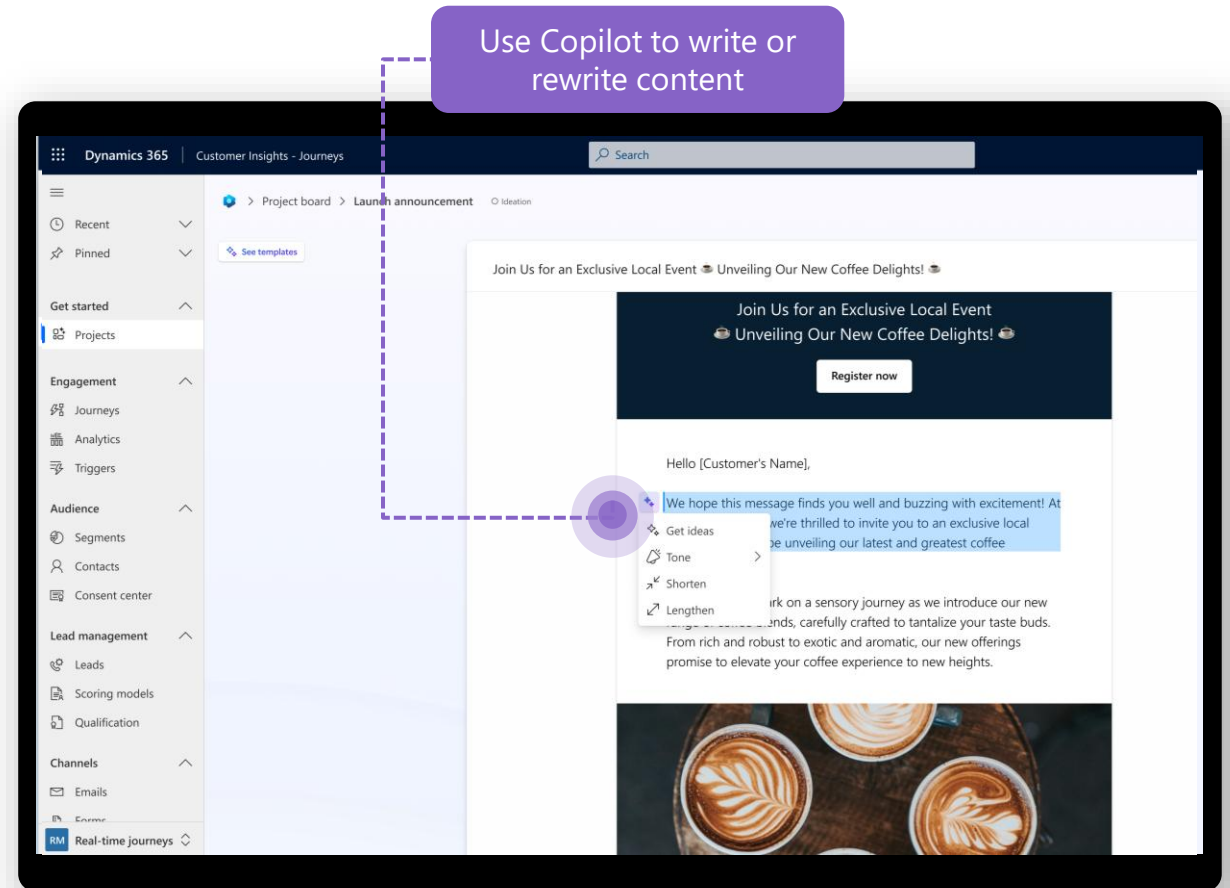
 Jumpstart marketing campaigns in a single space with curated recommendations from Copilot

Kickstart email creation with suggestions from Copilot based on key messaging points

 Receive AI-recommended images based on content of the email or generate new ones with Typeface integration



Marketer



Use Copilot to write or rewrite content

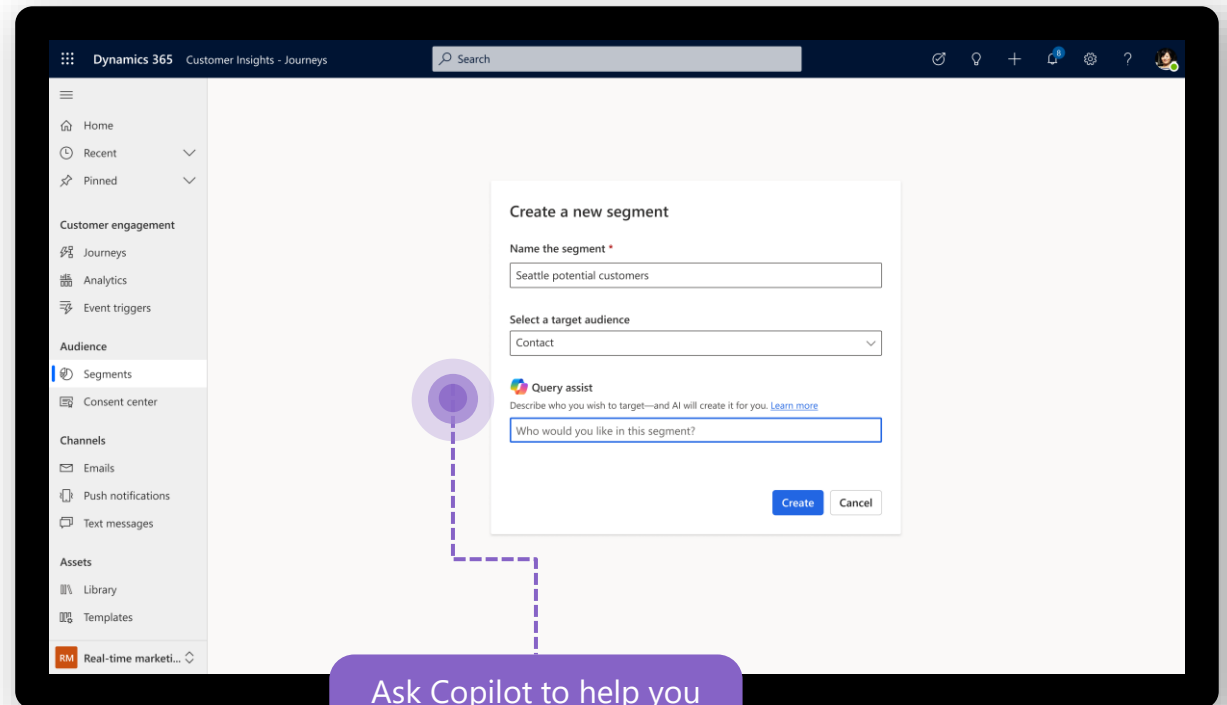
Relevant, real-time journeys

Create new segments

Create real-time segments using the Copilot query assist feature

Generate rules for the segments with simple, conversational prompts

Reduce time and effort by avoiding constructing complex segments in SQL



Dynamics 365 Customer Insights - Journeys

Create a new segment

Name the segment *

Seattle potential customers

Select a target audience

Contact

Query assist

Describe who you wish to target—and AI will create it for you. [Learn more](#)

Who would you like in this segment?

Create Cancel

Ask Copilot to help you build a new segment without needing SQL

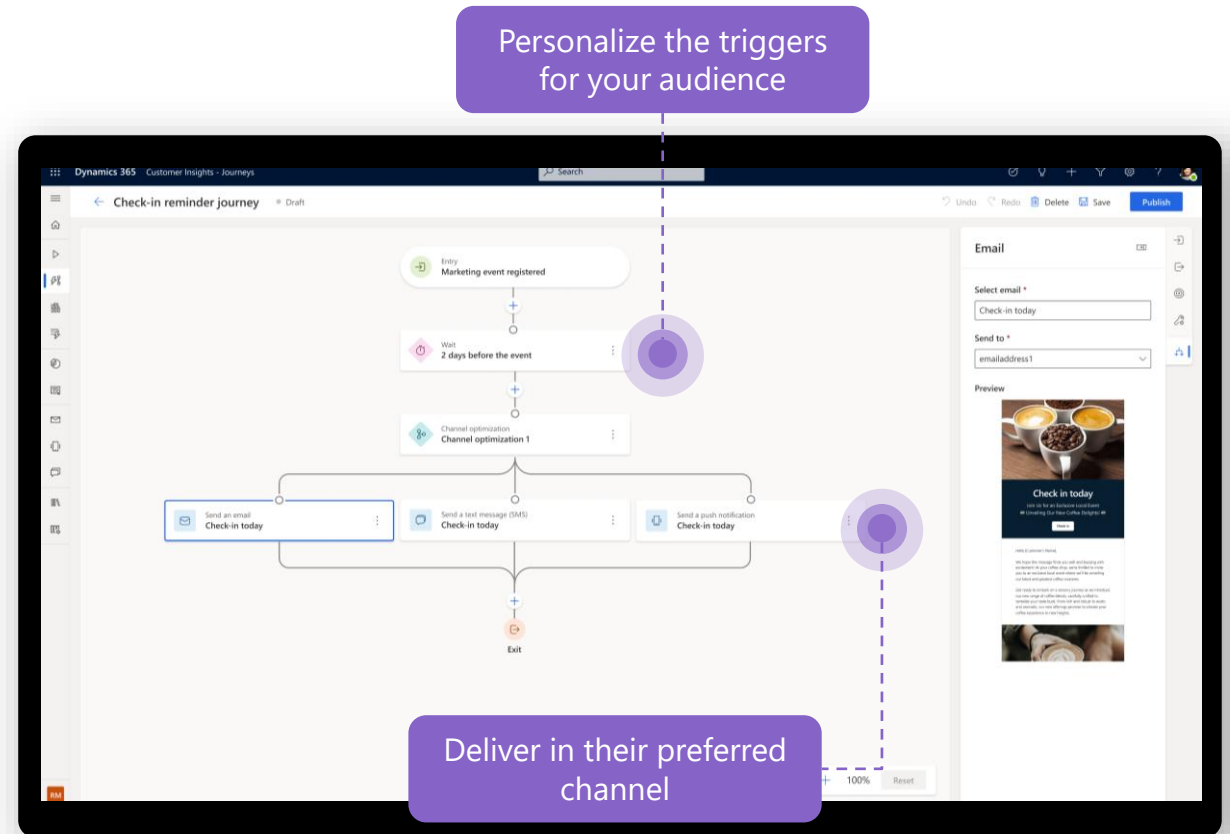
Relevant, real-time journeys

Nurture leads in real time

React to customers' actions in real time using built-in or OOB triggers

Deliver experiences based off behaviors or profile attributes and set frequency controls

Use AI-driven channel optimization based on customer's historical data



Enhance sales with greater intelligence and efficiency

- Build a shared vision
- Close faster and build loyalty
- Continue the conversation
- Enable greater visibility



Enhance sales with greater intelligence

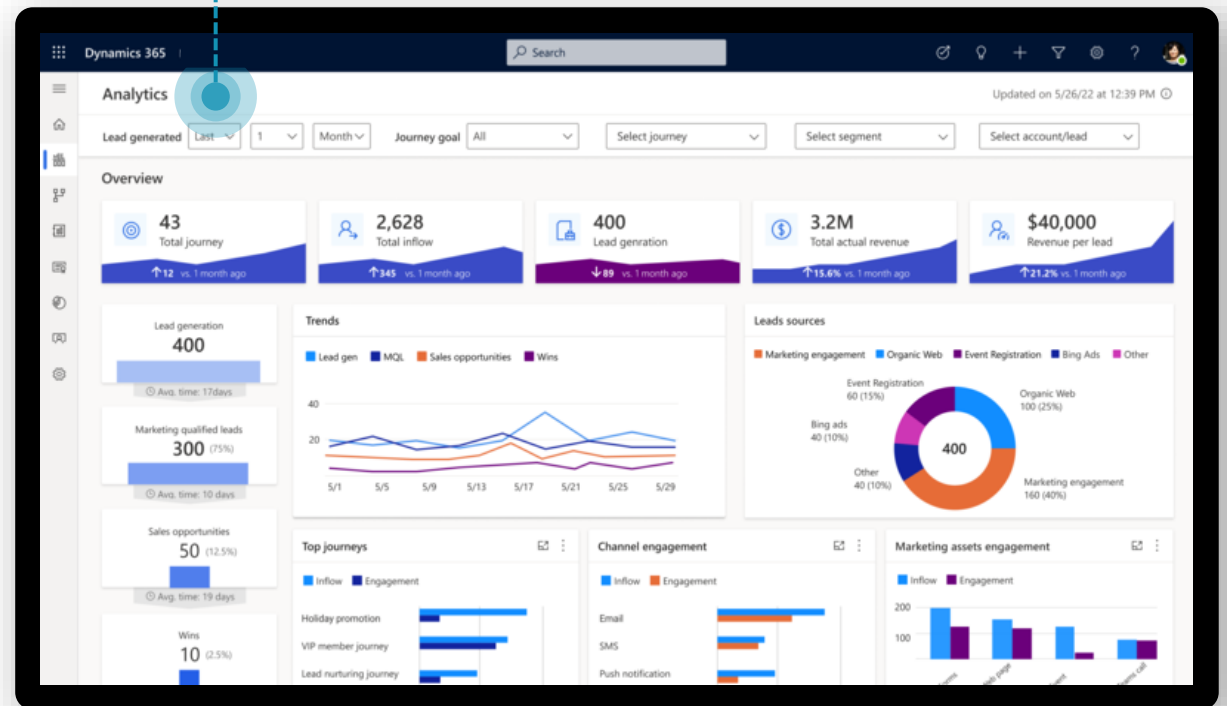
Build a shared vision

Get a comprehensive view of accounts tracking through the pipeline with seamless integration with Dynamics 365 Sales

Understand the main drivers for lead generation and qualification

Learn what sources are the biggest drivers to high-quality leads

Get a shared view of pipeline with Sales



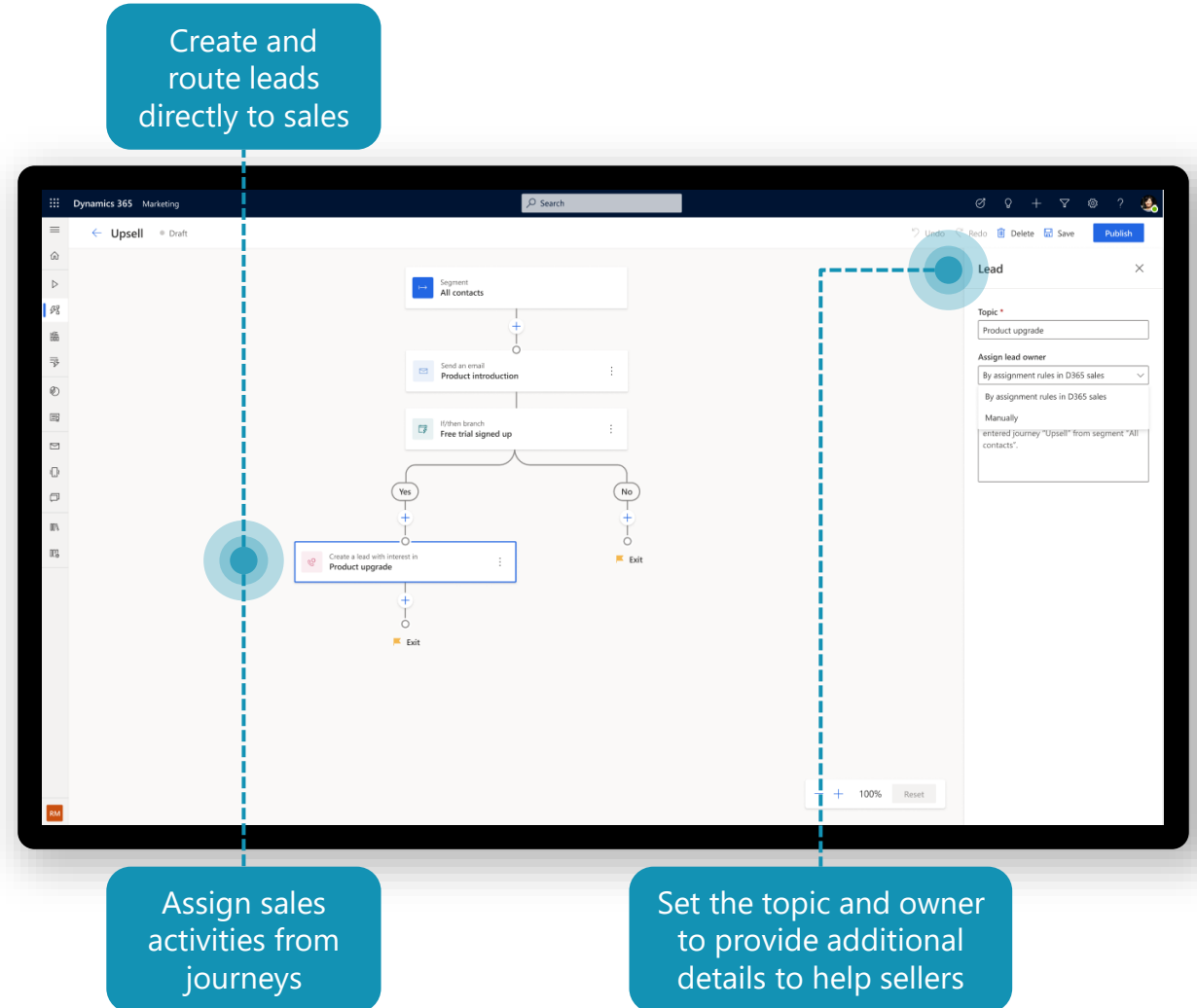
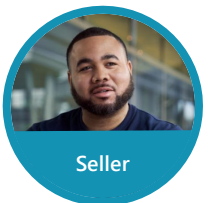
Enhance sales with greater intelligence

Close faster and build loyalty

Assign sales activities directly from marketing journeys triggered by customer signals

Get prioritized, ranked leads directly in the seller's worklist to close deals faster

Nurture customers after the sales by adding them to relevant campaigns to enhance personalization



Enhance sales with greater intelligence

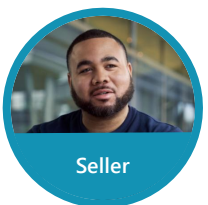
Continue the conversation

Empower sellers with a comprehensive view of customers with a unified time from across the organization



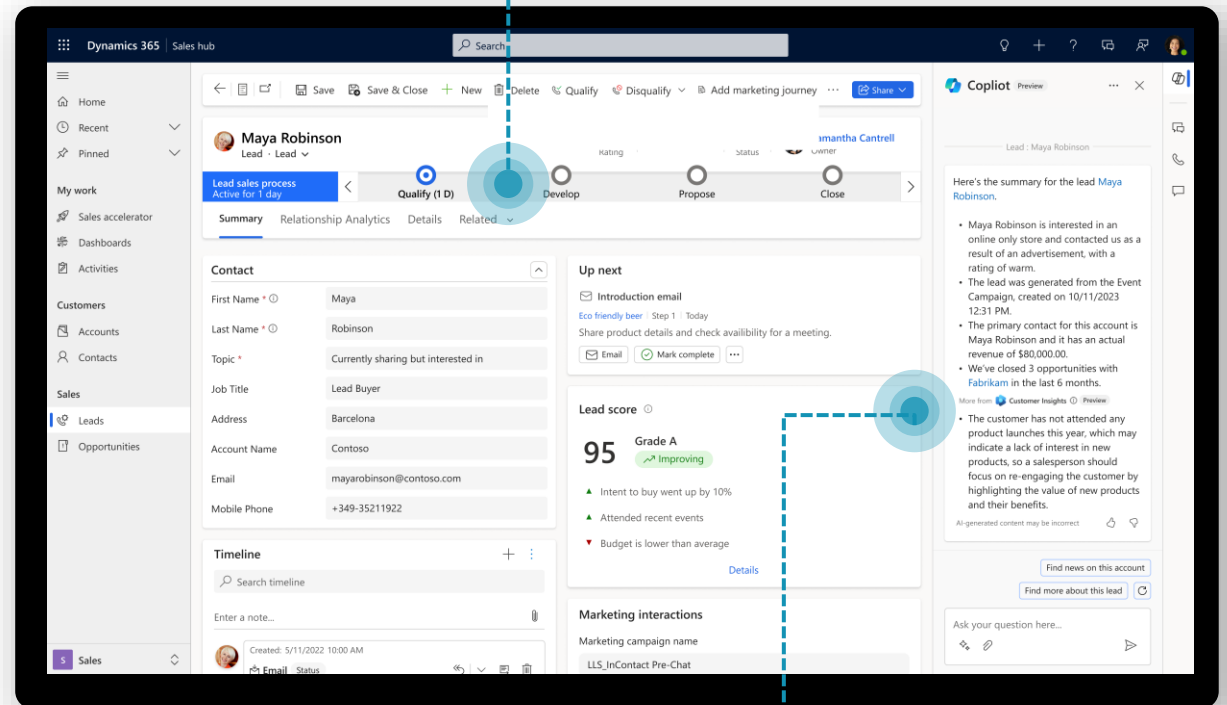
Access previous customer interactions to understand their experience using Copilot

Search and filter customer activities to drive contextual understanding and improved customer conversations



Seller

Gain a full-view of customer interactions across departments to engage more meaningfully



Ask Copilot for more information a contact

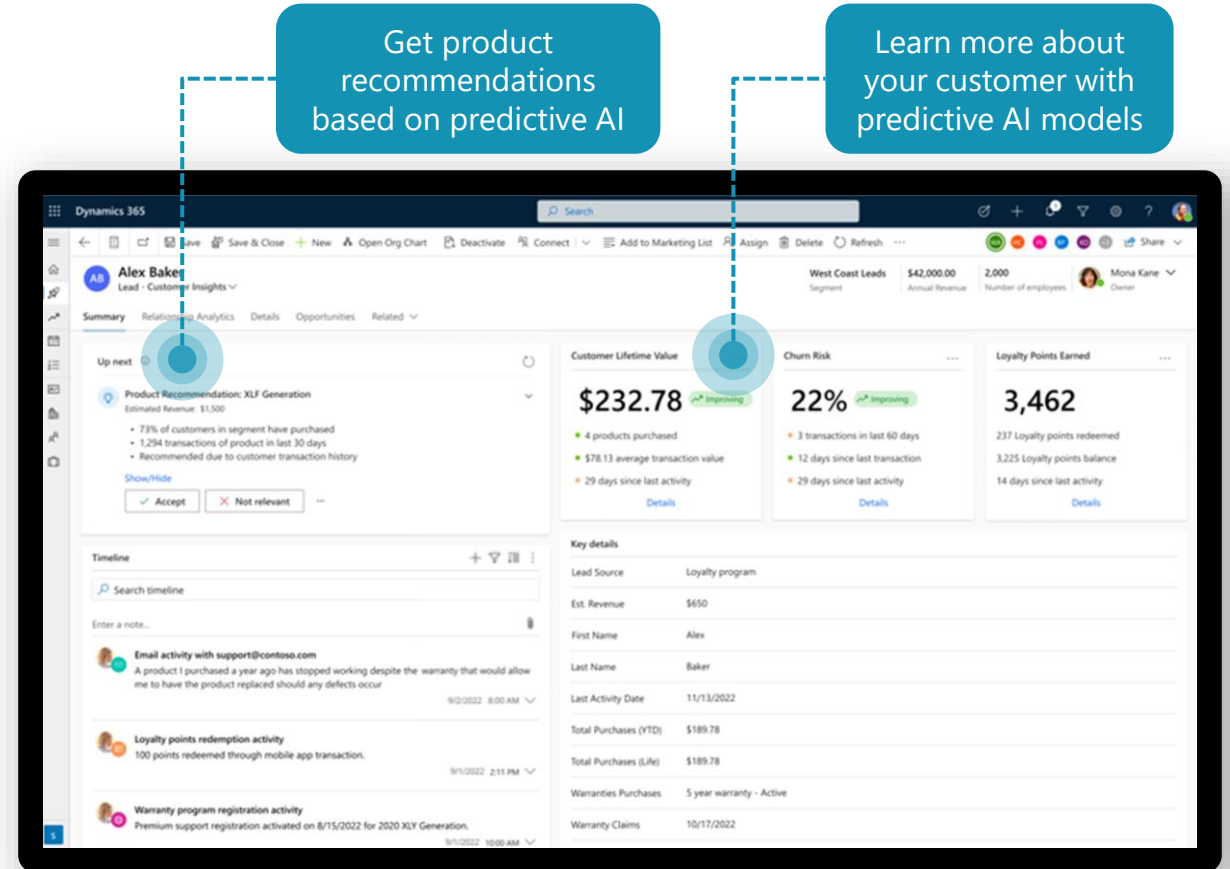
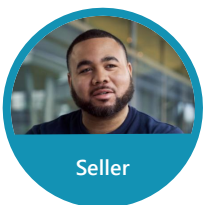
Enhance sales with greater intelligence

Enable greater visibility

See AI-recommended products to improve cross-sell and up-sell for sales teams

Understand more about the customer with AI-powered insights

Provide sellers with priority rankings based on real-time AI insights



Improve agent insights and case closure

- Understand customer context
- Stay up to date on disruptions
- Deliver personalized service



Improve agent insights and case closure

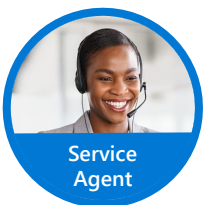
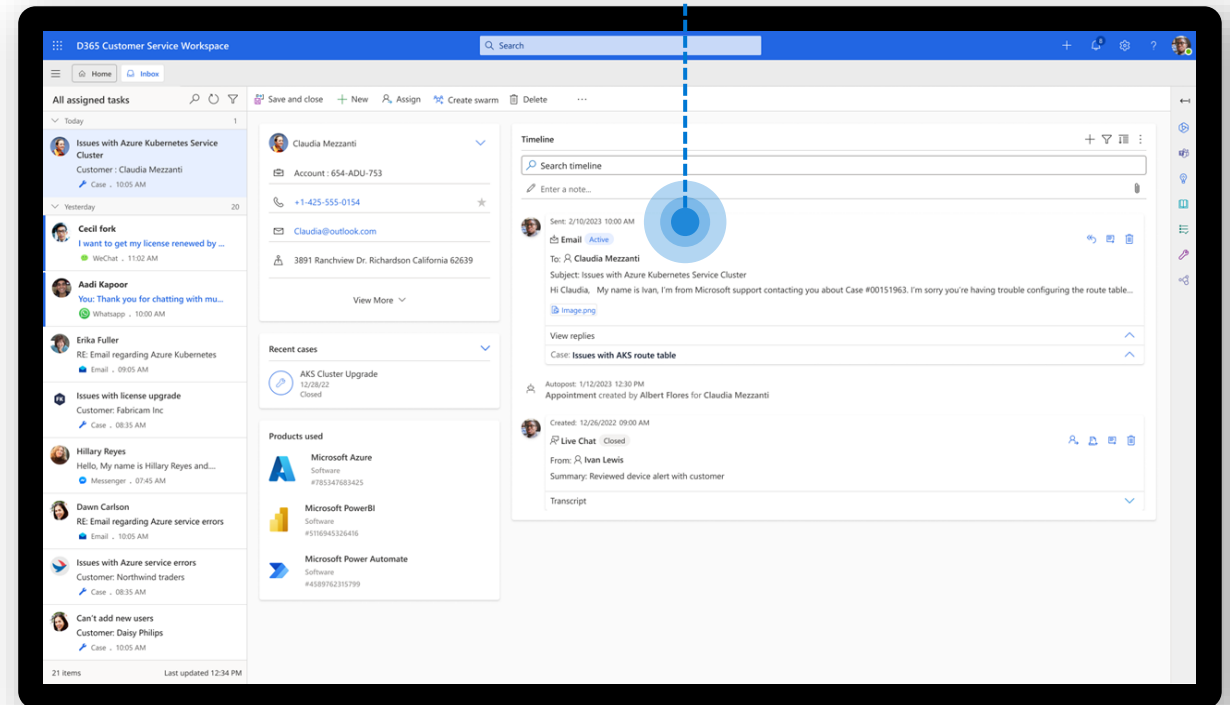
Understand customer context

Empower agents to help escalate with a comprehensive view of the customer across marketing, sales, and service

Optimize performance by assessing relevant data from marketing and sales departments

Resolve issues more efficiently and enable better customer experiences

Gain a full-view of customer interactions across departments to engage more meaningfully



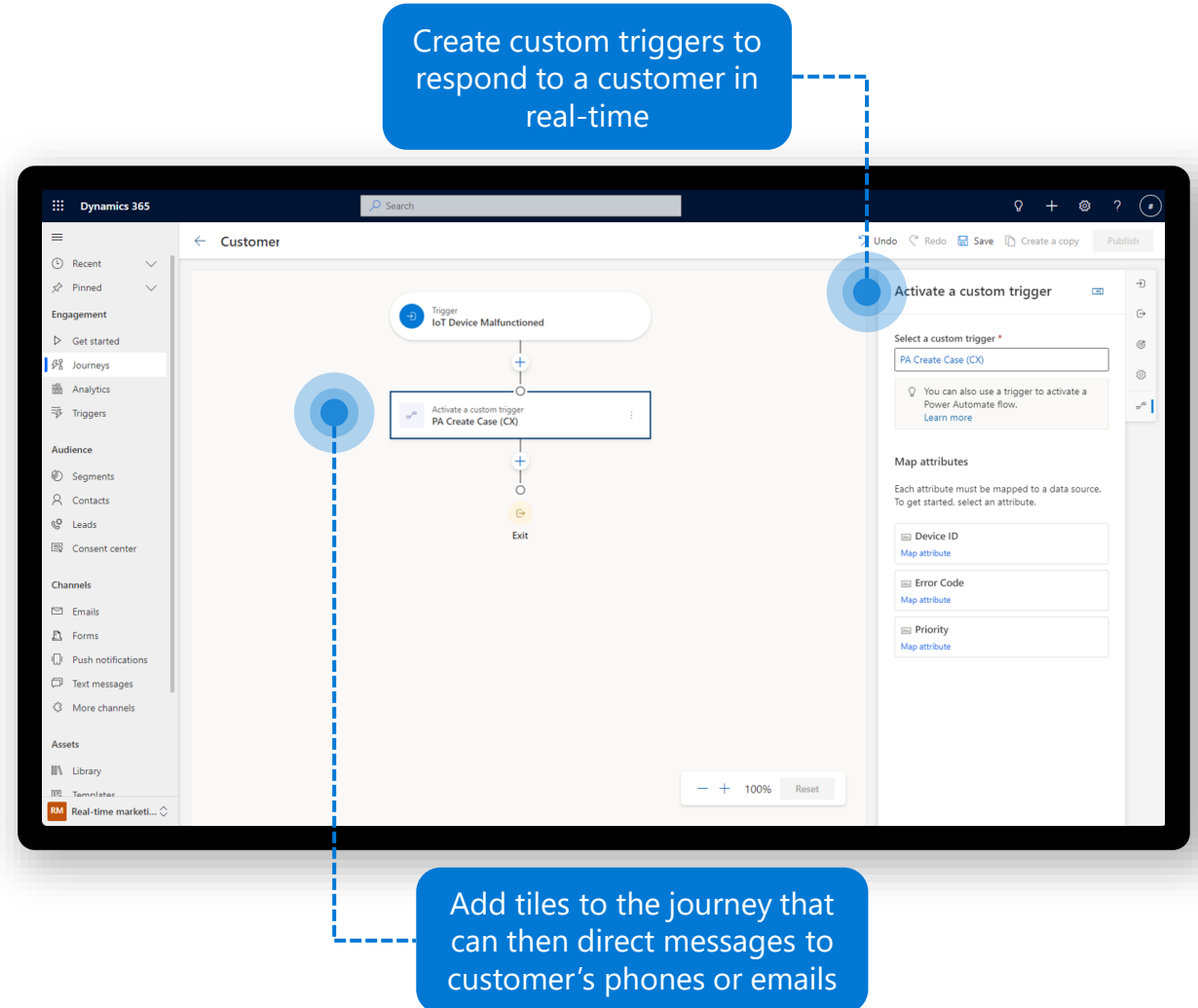
Improve agent insights and case closure

Stay up to date on disruptions

Identify IoT issues and notify customers through custom triggers via text message

Automatically create support tickets for the IoT issue with error code and device information for easy tracking

Send emails when status changes on the support ticket



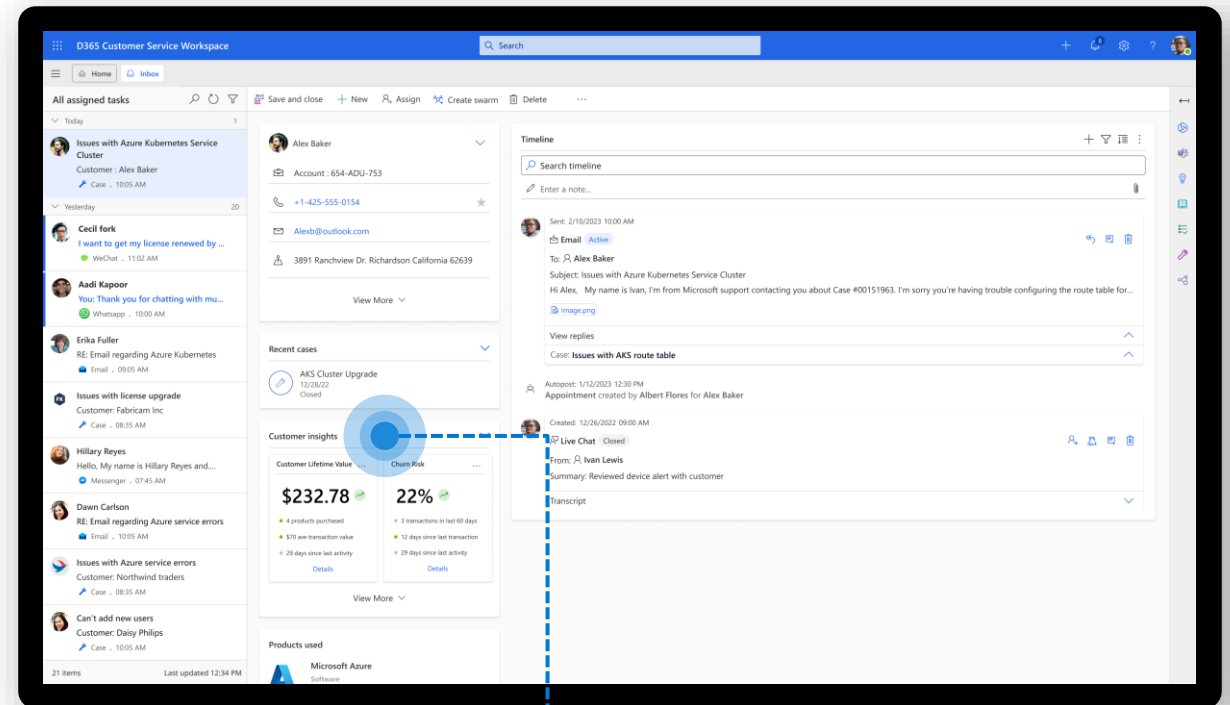
Improve agent insights and case closure

Deliver personalized service

Prioritize your best customers with access to insights like Customer Lifetime Value and churn risk

Improve call routing based on improved customer knowledge

Update customer profiles and journeys when there is service issue or a resolution



Better understand your customer's value to prioritize case resolution

