



ServerSys

# Microsoft Dynamics 365 Customer Insights

Empower your team with a customer data platform and real-time marketing capabilities for personalised experiences and insights.

Microsoft Partner

[www.serversys.com](http://www.serversys.com)



# Customer Insights – Summary

- Connect transactional, behavioural, and demographic data to **create 360-degree customer views**.
- Create customer journeys to **deliver personalised content in real time**.
- **Boost productivity** with Copilot features to streamline your marketing processes, including building audience segments and creating journey flows.
- Use natural language and your website as a reference to receive **recommendations for branded and tailored marketing content**.
- **Align sales and marketing** with automated lead scoring and inbuilt dashboards to monitor key metrics.


The screenshot displays a customer profile for Abbie Bonam. The profile includes a profile picture, name, location (Richmond, California, USA), and last activity (9/26/2023 11:30PM). Below this is a list of personal details: CustomerId (00301c483b009b63c08c20e5fd96340a), FirstName (Abbie), LastName (Bonam), Gender (Female), DateOfBirth (1/5/1981), Telephone (839.710.8555x546), Email (Abbie\_3432@relecloud.com), and Address (929 John Green, Richmond, California 24441 USA). There are also sections for 'Additional fields' (Interest: False, Customer\_Modified...: 10/28/2022, 10:41 AM (UTC)), 'Ids', and 'Dynamics: Contacts' (Contactid: CNTID\_3519, Contactid\_Altern...: CNTID\_3519) and 'POS: Customers' (LoyaltyId: LOYID\_3519, LoyaltyId\_Alternate: LOYID\_3519).

The 'Activity timeline' section shows a filter icon and a grid of activity metrics: 1 Cases, 51 EmailActivity, 10 OnlinePurchases, 9 POSPurchases, 1 Subscriptions, and 3 WebsiteReviews. Below this is a list of recent activities for September 2023, sorted by date. The activities are: Website visit - 5 min ago (REAL TIME) at https://www.contosocoffee.com/home; Website visit - 3 min ago (REAL TIME) at https://www.contosocoffee.com/sale; and Website visit - Just now (REAL TIME) at https://www.contosocoffee.com/espressomachine/sale/product/pg1000pro. The timeline also shows activity for August 2023 (14), July 2023 (1), June 2023 (1), May 2023 (1), and April 2023 (1). A specific activity is highlighted: 'Opened - 6/1/2023' with the note 'Information about new product was sent'.

# Unified Customer Profiles

**Dynamics 365 Customer Insights - Data is Microsoft's customer data platform (CDP), providing a holistic view of each contact.**

- Resolve customer identities by unifying relational and operational data and enrich profiles by connecting external data sources.
- Use insights and integrations with Microsoft and third-party apps to gain actionable insights that drive personalised interactions at scale.
- Identify trends using prebuilt machine learning templates that predict customer lifetime value and promote recommended actions.
- Maintain complete control over your data with a self-service, enterprise-grade CDP built on Microsoft Azure.

 Discover insights about your customers in natural language

Generate insights about your customers by simply asking a question in natural language. If you are not familiar with

customers full name and email who are enrolled in the Program like Sustainability and living in California

AI-generated content can have mistakes. Make sure it is accurate and appropriate before using. [Read terms.](#)

Tips for better results:

- Use names of specific columns and data. For example, "How many subscriptions were activated last year? Use the ActivateDate
- Append additional or clarifying information. For example, "Which customers live in GA? GA is referring to the state Georgia in the

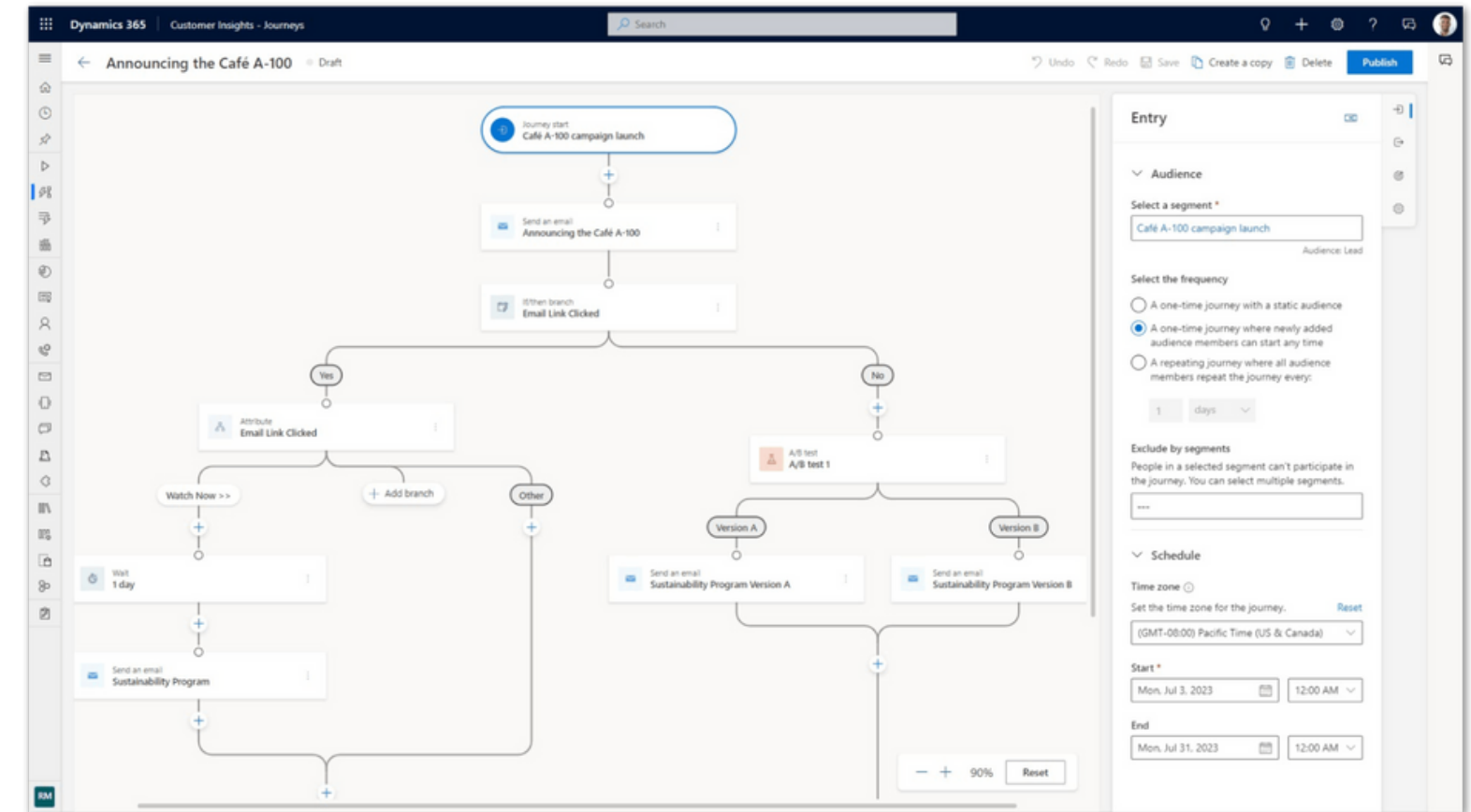
Results

Full Name	E-Mail
Donald Lafarga	donald_lafarga@simmonsjuarezandcrosby.com
Charles Espe	charles_espe@dunnbensonandgeorge.com
Robert Idema	robert_idema@thomasrobbinsandnorris.com
Steven Giaquinto	steven_giaquinto@hancockpierce.com
Paul Bousley	paul_bousley@buckandsons.com

# Engage Customers in Real-Time

**Use Dynamics 365 Customer Insights – Journeys to increase engagement by responding to customer actions across multiple channels.**

- Create contextual journeys by using customer-triggered events to respond at critical moments that will maximise engagement and convert interest.
- Improve outcomes by running A/B tests across journeys to identify the best-performing content and journey branches.
- Engage customers across email, SMS, push notifications and custom channels such as WhatsApp.
- Implement dynamics flows that encourage recipient action by sending personalised reminders until they respond.



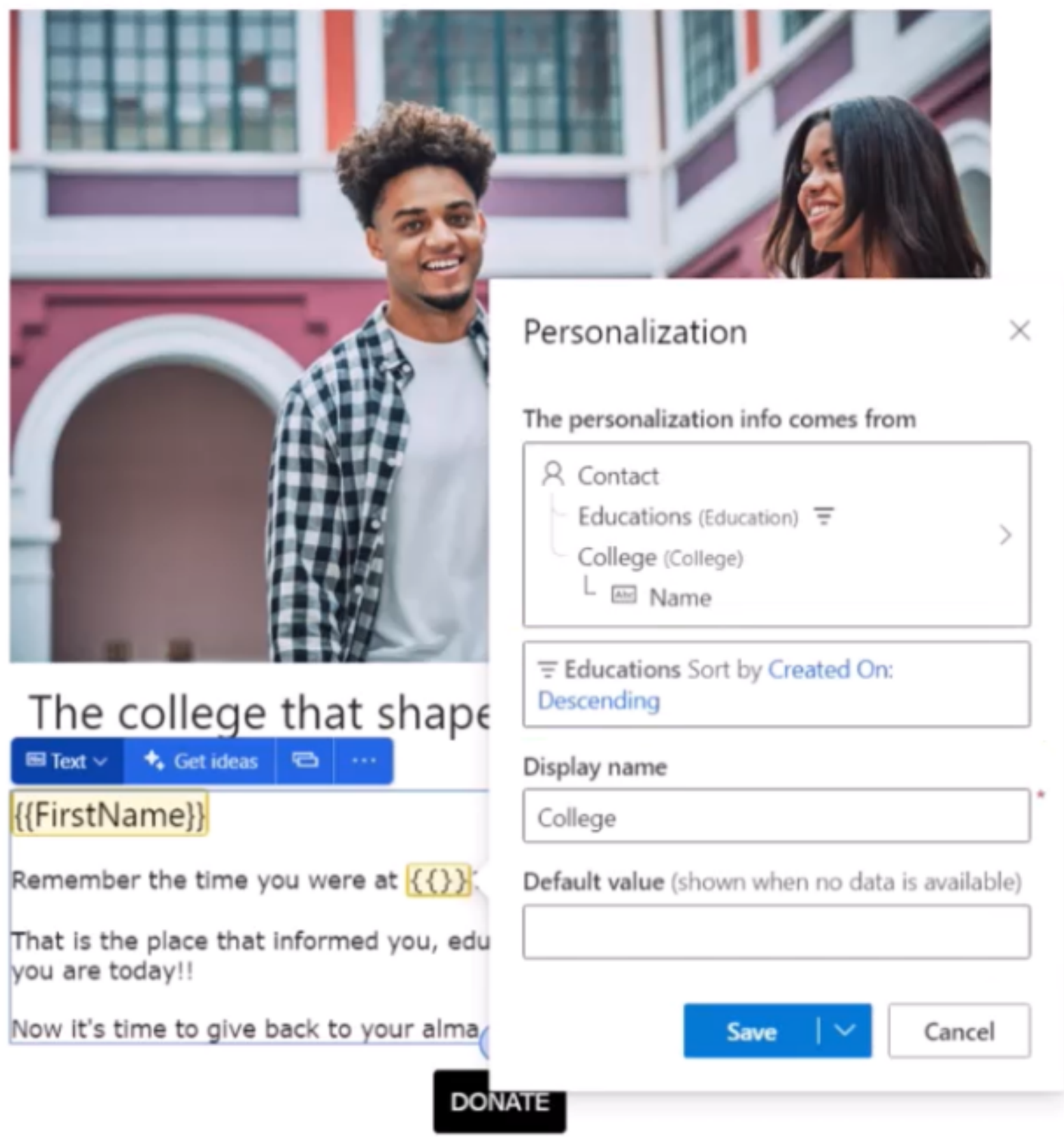
The "Create a new journey" form is shown with the following fields and options:

- Name the journey:** A text input field containing "New event based journey".
- Choose the type of journey:** Two radio button options: "Trigger-based" (selected) and "Segment-based".
- Choose a trigger \*:** A dropdown menu with "Cart Abandoned" selected. Below it, the audience is identified as "Customer Insights Profile".
- Condition:** A dropdown menu with "Cart Abandoned" selected, and a sub-menu with "Cart Total" selected.
- Value:** A text input field containing "50".
- Buttons:** "Create" and "Cancel" buttons at the bottom right.

# Personalise Communications

**Grow relationships and nurture prospects to maximise engagement using Dynamics 365 Customer Insights to create highly personalised emails.**

- Take personalisation to the next level with dynamic and conditional email content – without writing code.
- Customise messages with personalised content, such as images, text, buttons, or links, based on stored data of a recipient's interests, location, and demographics.
- You can experiment and refine your messages with A/B testing to see what resonates with recipients.



The screenshot displays the Dynamics 365 Personalization interface. On the left, a preview of an email is shown with a header image of a young man and woman. The email text includes a subject line "The college that shape", a salutation using the placeholder `{{FirstName}}`, and a "DONATE" button. On the right, the "Personalization" configuration panel is open, showing the data source hierarchy: Contact > Educations (Education) > College (College) > Name. It also shows sorting options for "Educations Sort by Created On: Descending", a "Display name" field set to "College", and a "Default value" field. The panel includes "Save" and "Cancel" buttons.

# Boost Marketing Productivity

## Save time and reduce manual effort in building campaigns and creating content with AI-powered Copilot capabilities.

- Create marketing emails quicker with contextual ideas and Copilot drafts.
- Easily create audience segments using natural language queries to minimise navigating data structures.
- Simplify the creation of customer journeys using Copilot to draft flows by describing your desired triggers, target audience and sequence.
- Accelerate campaign activation by directing Copilot to consistently use your website to brand emails and forms.

Create journey with Copilot PREVIEW

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 AI-generated content may be incorrect

Describe your customer journey in everyday words

0/500

Abandoned cart journey

Trigger: Cart abandoned | Audience: Contact

Entry  
Cart abandoned

Send an email  
E.g. Reminder email

If/then branch  
E.g. Purchase completed

Yes No

Send an email  
E.g. Thank you email

Wait  
3 days

Create manually Cancel

Copilot

Describe what your content is about

Add up to five key points that you want to get across in your email. Copilot will generate a set of text suggestions.

Use examples

Announcing the eco-friendly Café A-100 Automatic

Watch our announcement video

Save energy and money

Environmental approach to coffee making

+ Add a keypoint Clear all

Well done!

Tone of voice

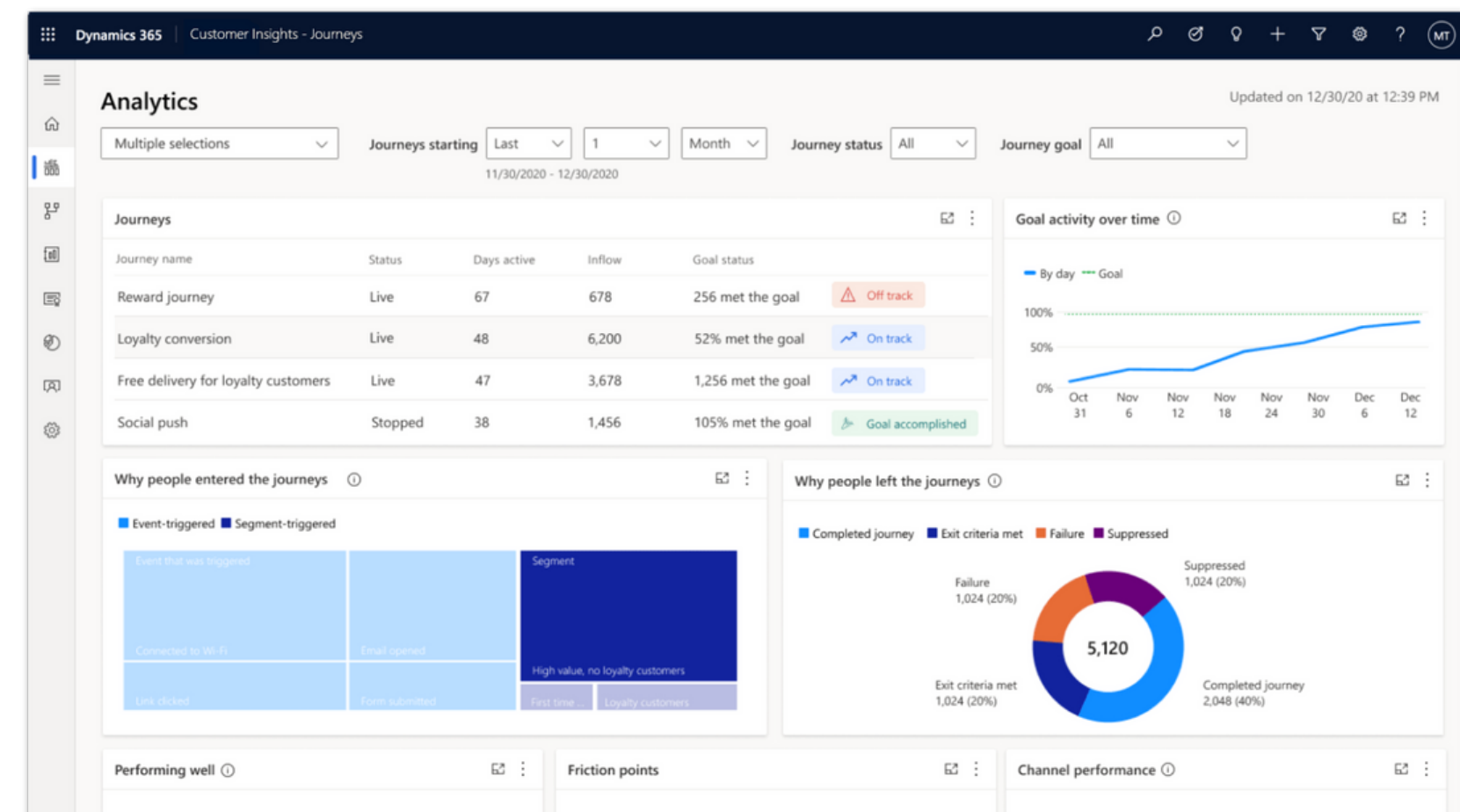
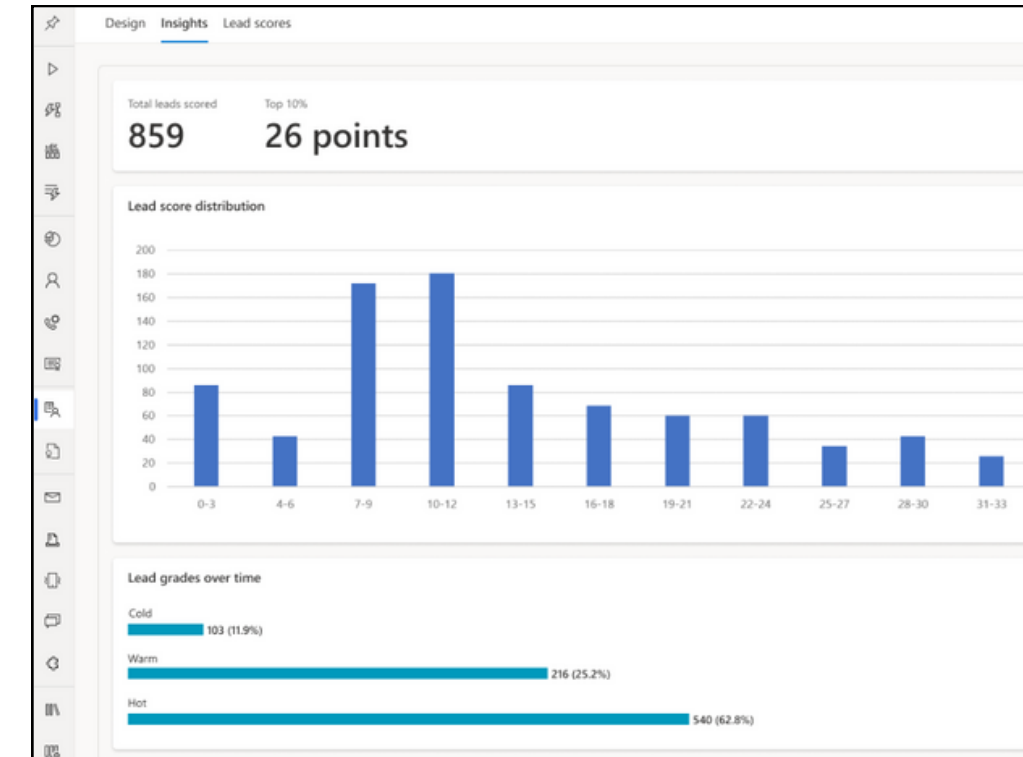
Engaged

Get ideas

# Align Marketing and Sales

**Define a scoring model using Customer Insights to ensure consistent lead qualification and identify sales-ready leads.**

- Identify leads using an automated scoring model using interactions, demographics and other criteria.
- Assign a weighted score for each action and depreciate values if no recent engagements are tracked so that only active leads are picked up.
- Automatically notify sellers when the score crosses a threshold for timely attention and maximum conversions.
- Use pre-made analytics to track drivers for lead generation and qualification that will support alignment between sales and marketing teams.



# Simplify Event Management


**Customer Insights event management helps teams at every step, from planning and budgeting to promotion, registration, lead generation and reporting.**

- Manage any type of event – online, on-site, or hybrid.
- Streamline event management processes within a single system.
- Includes native integration with Microsoft Teams Live Events.
- Reduce time and effort by automatically sending participants registration confirmation, payment details, reminders and other messages.
- Promote events to maximise attendance and send follow-up messages to nurture participants and increase engagement.

### Stream This Event Online

Do you want to stream this event  Yes

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Streaming provider \*  Teams Live Events

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Recording available to attendees  No

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Do you want to enable Q/A for this event  Yes

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Attendee URL

CS Contoso Series - Entrepreneurship Online  
Event

EventMainBusinessProce...  
Active for 34 days

Preliminaries (34 D) Agenda Organize Promote

General Agenda Website and form **Registration and attendance** Additional information Social insights Room reservations Related

#### Event registration

Event registrations

<input checked="" type="checkbox"/> Contact	Registration ID	Company Name (Contact)	Email (Contact)
Annie Zigrand	ER FDT96D2DAQNLW48BR6KJ4JYTXH...	Fabrikam Inc.	annie.zigrand@fabrikam.com
Cameron Baker	ER NN5CVCP5Q9U8ER44ZFF6SEFDYA...	Bellows College	cbaker@bellowscollege.com
Hayden Cook	ER QP94VTTXNC68E58KQ2EZ6R4LNC	Adatum	haydencook@adatum.com
Sara Perez	ER SQP3VFKT7Z6FERC2ZWRX69YHXC...	Lucerne Publishing	sara.perez@lucernepublishing.com



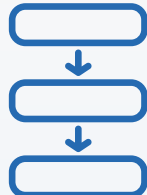
# Our Dynamics 365 Customer Insights Solutions Include:



**Email  
Marketing**



**SMS Text  
Messaging**



**Customer  
Journeys**



**A/B  
Testing**



**Web  
Forms**



**Scoring  
Models**



**Lead  
Generation**



**Event  
Management**



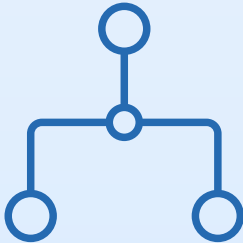
**Customer  
Profiles**



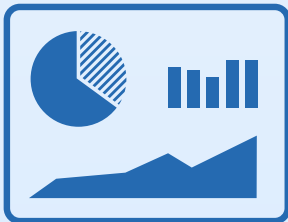
**Data  
Enrichment**



**Audience  
Segments**



**Conditional  
Content**



**Marketing  
Analytics**



**Consent  
Management**



**Branding  
Control**

# Connected Solutions

**Combine your data with real-time marketing, and AI-productivity features to provide personalised, connected customer journeys.**

For a fully unified solution, Dynamics 365 Customer Insights natively connects with other Microsoft Business Apps to align sales, service, marketing and more teams.



## **Dynamics 365 Sales**

Enabling sellers to increase efficiency by minimising manual processes and unlocking data insights.



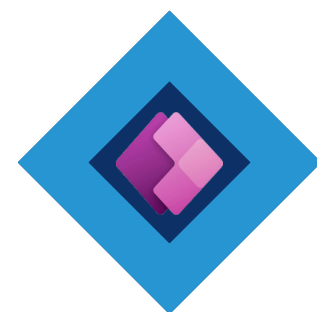
## **Dynamics 365 Customer Service**

Empowering teams to consistently deliver personalised service.



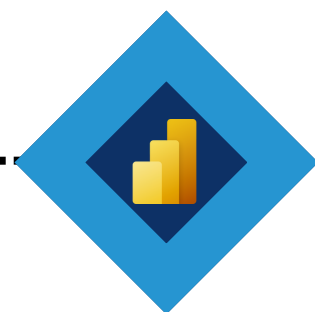
## **Dynamics 365 Customer Insights**

Engage customers with timely, personalised content delivered through the right channels.



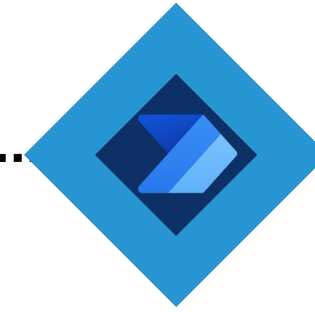
## **Power Apps**

Turn ideas into solutions with low-code custom apps that solve your business challenges.



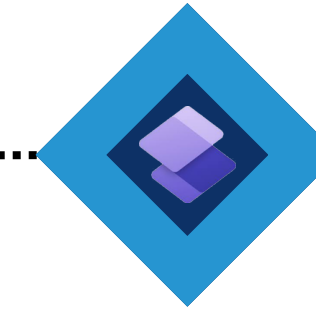
## **Power BI**

Visualise your data in new ways to uncover insights that will drive quicker, better-informed decisions.



## **Power Automate**

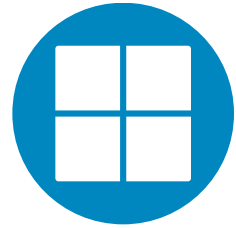
Streamline repetitive tasks with automated workflows that boost productivity.



## **Power Pages**

Quickly deploy process-driven portals delivering vital information and services to your customers.

# About ServerSys



We are a leading **UK Tier-1 Microsoft Cloud Solutions Provider** and a Dynamics 365 and Power Platform Partner.



We offer **web portal and CRM development, consultancy, support and training** to financial services organisations and companies across many sectors.



We have been **in operation for over 25 years** and take pride in our **96% client retention rate**.



Our **self-service portals** reduce costs, **enhance communication** and improve client onboarding.



We enable organisations to streamline processes and connect their data with Dynamics 365 to provide a **single source of accurate data**.

We build collaborative partnerships with organisations including:





# ServerSys

## Speak to us today

Let ServerSys help you strengthen relationships, boost productivity and accelerate revenue growth with Dynamics 365 Customer Insights.

Contact us today to discuss your requirements.

Microsoft Partner

[www.serversys.com](http://www.serversys.com)

