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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

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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.

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 w

> 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 th
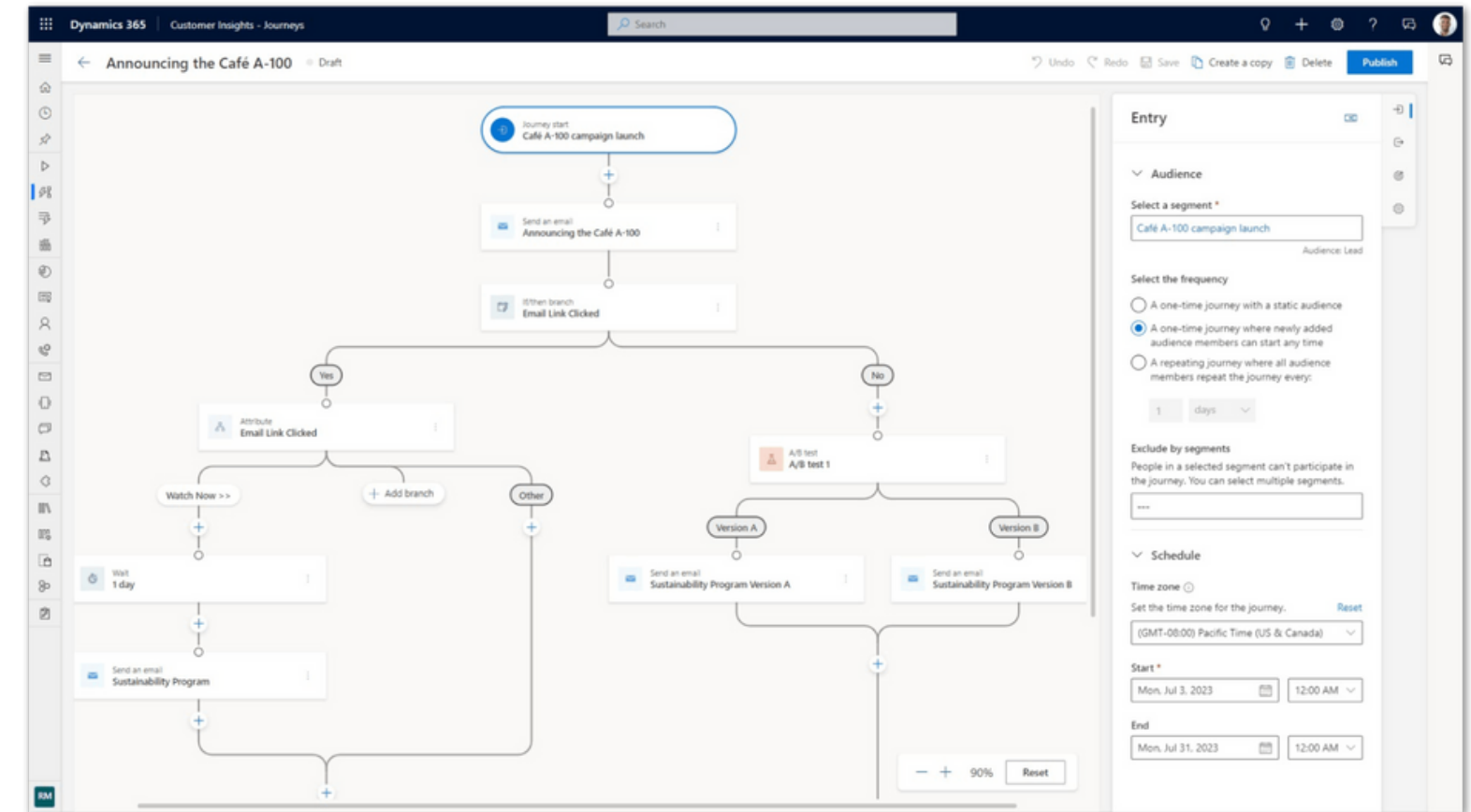
Results

Full Name	EMail
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

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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.
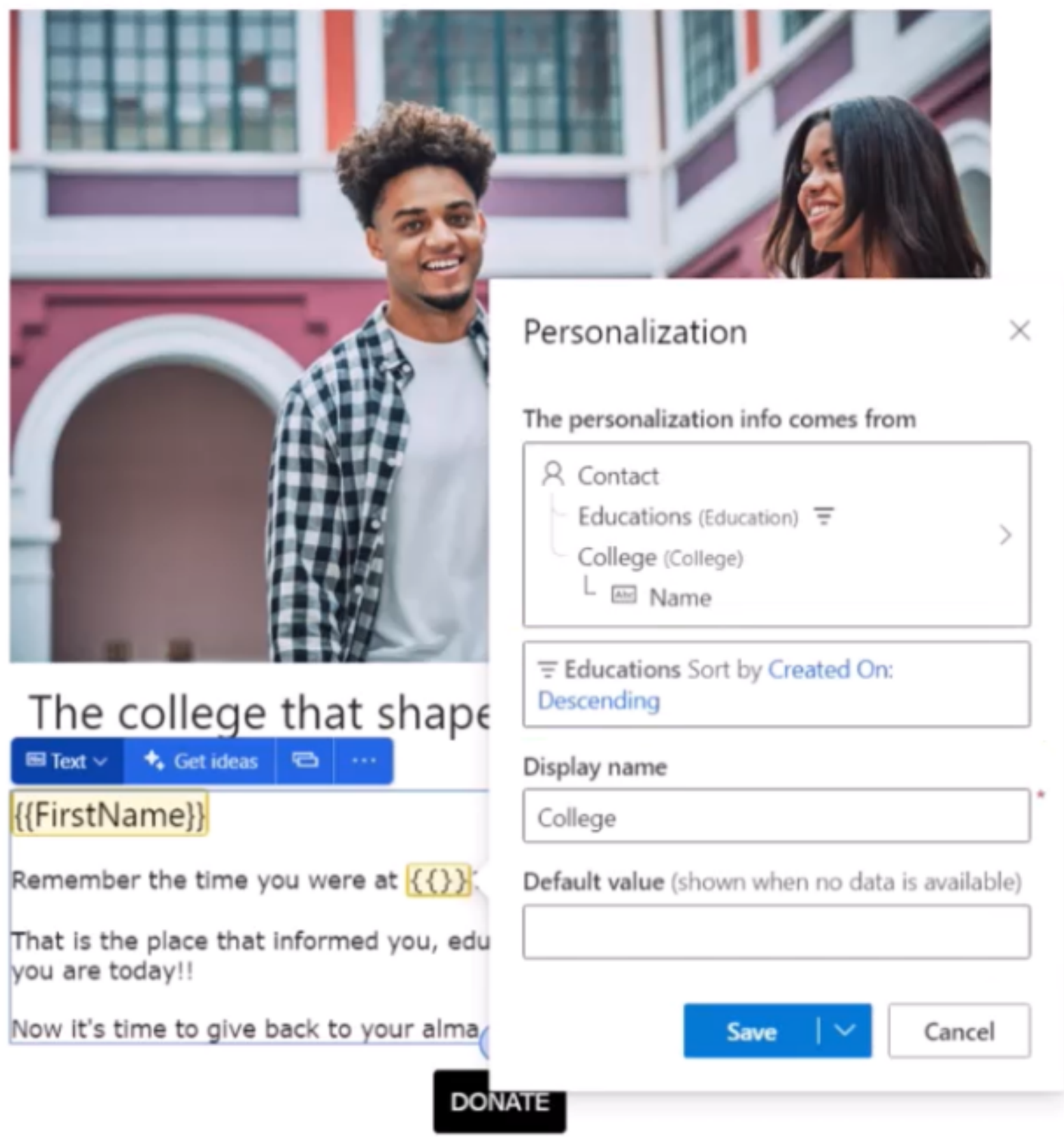

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Personalise Communications

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.

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.

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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.

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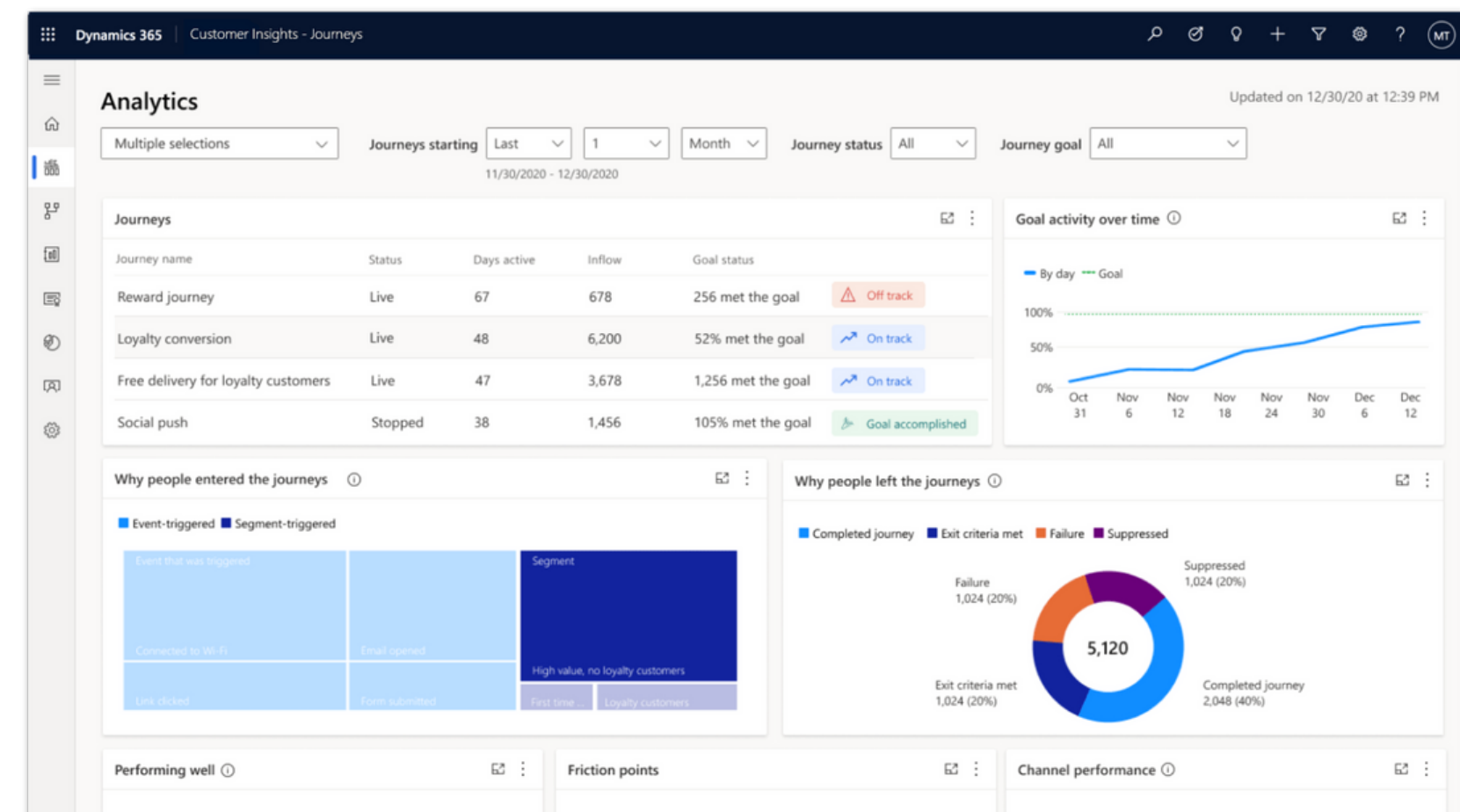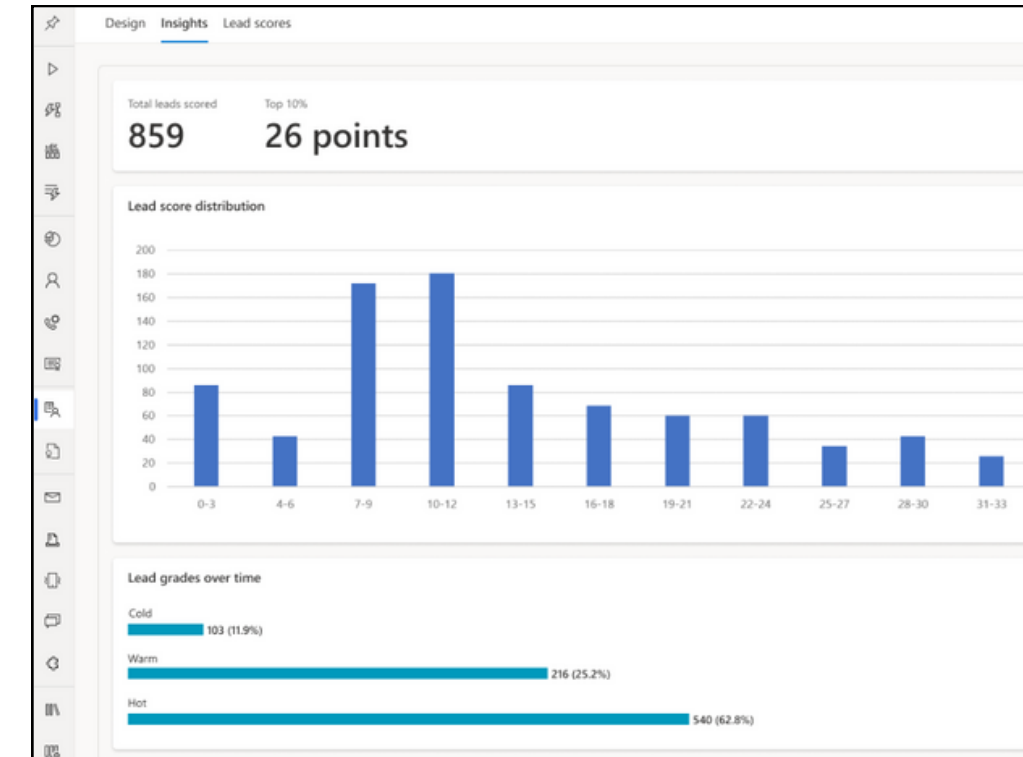
Simplify Event Management

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.
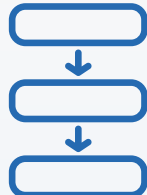
Our Dynamics 365 Customer Insights Solutions Include:

Email Marketing

SMS Text Messaging

Customer Journeys

A/B Testing

Web Forms

Scoring Models

Lead Generation
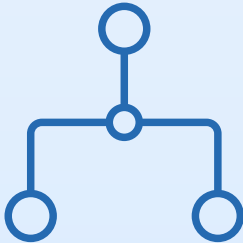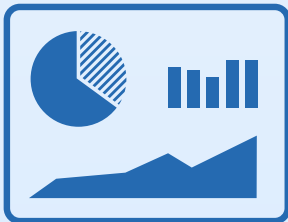
Event Management

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 Insghts

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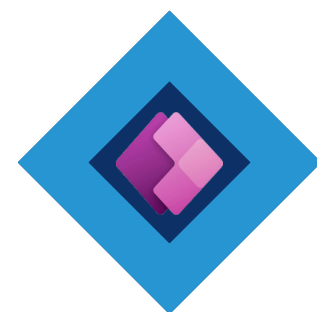
Power Apps

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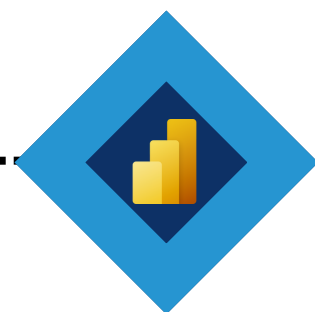
Power BI

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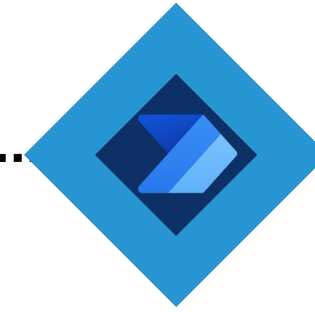
Power Automate

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.

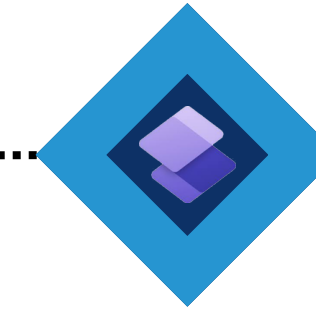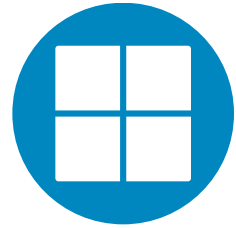We have been **in operation for over 25 years** and take pride in our **96% client retention rate**.

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:

HSS Hire | Field Gibson Media | O'REILLY® | CIFAS Leaders in fraud prevention | COMMERCIAL EXPRESS

mitie | BRITISH MARINE | BUSINESS LDN | POLICE:NOW INFLUENCE FOR GENERATIONS | GUINNESS ASSET MANAGEMENT

THE OFFICE OF THE Data Protection Authority | TOYOTA | CISI CHARTERED INSTITUTE FOR SECURITIES & INVESTMENT | Met Facilities | SELWOOD Plant & Pump, Hire & Sales

altodigital A xerox Business Solutions Company | hcml At the heart of recovery | TOWER HAMLETS | HONDA | DEX PROPERTY MANAGEMENT

CAPITA | AOA THE VOICE OF UK AIRPORTS | Lombard | INGENIOUS | Royal Ocean Racing Club

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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.

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