

Help organizations deliver exceptional customer experiences with personalized, responsive and connected customer journeys.

Dynamics 365 Customer Insights – Journeys: 6-week implementation



Dynamics 365 Customer Insights – Journeys was previously called Dynamics 365 Marketing.

Customer Insights – Journeys lets organizations engage with customers using a traditional segment approach, or in real time with trigger-based customer journeys using emails, text messages and push-notification channels.

You can personalize the customer experience and turn insights into relevant actions with AI-driven recommendations for content, channels and analytics. You can also customize and connect journeys with the other tools you already use, such as Dynamics 365 Sales and Dynamics 365 Customer Service.

To help your organization get full value from your investment in Dynamics 365 Customer Insights – Journeys, Cepheo offers a 6-week program that will enable your organization to take full ownership of the system.

Each week, we will work together to complete the essential activities that need to be done to fully implement Dynamics 365 Customer Insights – Journeys.

A typical program outline is shown below, but the overall timeline can vary based on how quickly we accomplish our goals.

Please note that creation of the actual marketing content, such as emails and forms is not part of this offer and that the overall price is an estimate based on a standard implementation and can vary based on your specific requirements.

Cepheo is one of the largest Microsoft Dynamics 365 partners in the Nordics

Our 400+ employees are specialists in digitizing business processes, and we are one of the largest providers of Microsoft Dynamics 365-based solutions in the Nordics.

Week 1

- Kick-off meeting to introduce Dynamics 365 Customer Insights – Journeys
- Agreement on the teams (your team and Cepheo) and on the project goals
- Overview of your existing solution and requirements
- Discussion of licensing requirements

Week 2

- Environments and other Dynamics 365 apps
- Data from external systems
- Installation of Dynamics 365 Customer Insights – Journeys
- Definition of users and access roles
- Domain authentication
- GDPR compliance and consent model
- Business unit scoping

Week 3

- Emails and email templates
- Text messages and other channels
- Forms and pages

Week 4

- Segmentation and triggers
- Customer journeys - design and goals
- A/B tests and channel optimization

Week 5

- Lead scoring model
- Lead qualification process (marketing qualified leads hand-off to sales)
- Use of built-in analytics reports

Week 6

- Run the first customer journeys
- Discuss next steps, e.g., event management, custom reports and Dynamics 365 Customer Insights – Data