



Customer 360

Powered by Microsoft Dynamics 365,
Customer Data Platform and 360°
Customer Experience.



Challenge

Explore the future of customer experience

Today, it's all about personalised engagements and deeper connections. At the heart of this is personalisation— knowing your customers and meeting their expectations seamlessly.

With technology rapidly evolving, consumers demand connected experiences like those in their favourite apps. From fitness to productivity tools, the expectation is the same: intuitive, efficient solutions.

Without the right tools, organisations risk decreased engagement and loyalty. Embrace an **intelligent customer experience** solution **leveraging AI** and collaboration to meet evolving needs efficiently.

This is how a **Customer Data Platform**, like Microsoft Dynamics, with built-in AI capabilities, allows users to access the data in natural language and integrates seamlessly with Microsoft 365 applications like Teams, Excel, Word, and Outlook.

The shift in customer experience is impacting everyone who interacts with customers:

- ▶ Data analysts aim to gain a comprehensive understanding of customers to ensure the highest level of personalisation.
- ▶ Marketers strive to connect with customers through their preferred channels and consistently deliver an optimal journey, regardless of the medium.
- ▶ Sellers seek to grasp the customers' journey and learn more about them, so they can act as trusted advisors and meet the customers where they are.

“Data isn't going anywhere, in fact, the volume of data in the world is expected to double by 2026.”

(>100,000EB) (IDC)

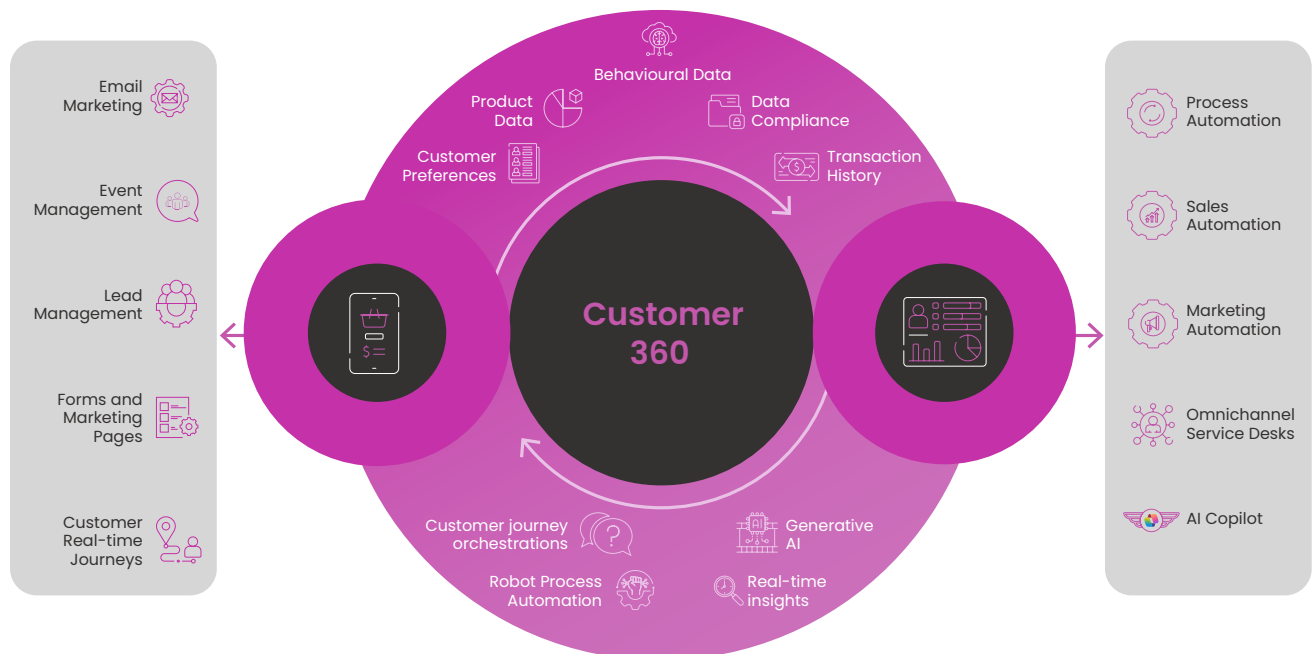
What is Customer 360?

Microsoft Dynamics 365: The Customer Data Platform of choice

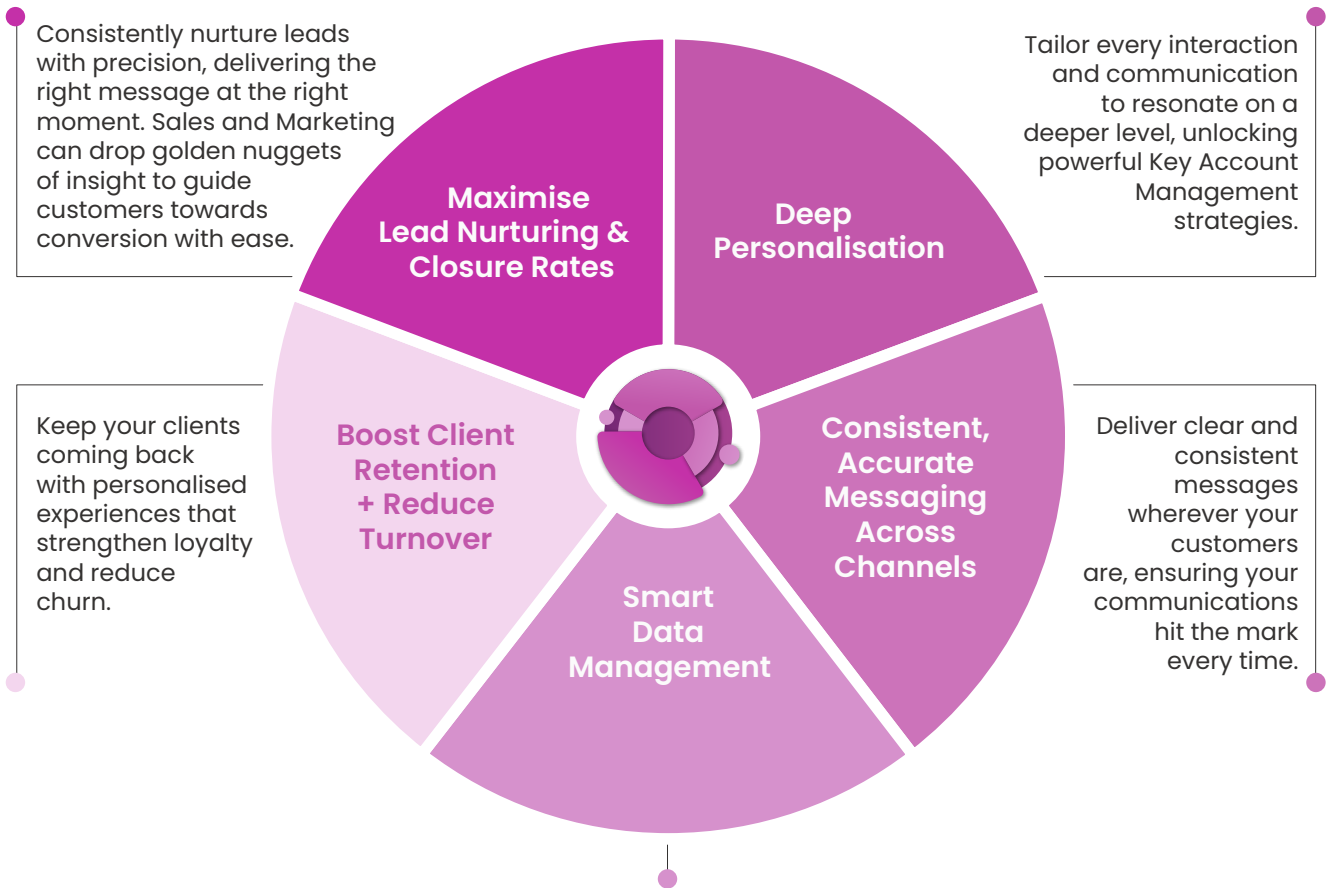
Our customers have data in numerous places, whether it is sales data in Salesforce, inventory, ERP information in SAP, AWS, or even Google. That **data needs to be brought into a single place** where it can be transformed and made useful to the business.

Within the CDP we can fully unify the data, to create a **deeper, 360-degree understanding of the customer** that is informed by all their interactions, transactions, and touchpoints. Not only do we create a unified customer profile, but we build a **real-time activity timeline** which serves as an illustrative history of all the touchpoints and knowledge for that customer.

Once you've unified your profiles you can use out-of-box AI and ML models such as customer lifetime value, sentiment analysis, or product recommendations to inform your approach to customer engagement. All this information is written into the Customer Data Platform that supports the Dynamics 365 ecosystem of products and solutions, Azure and Microsoft 365 tools such as Excel, PowerPoint and Teams. **Microsoft Dynamics 365** serves as a super conduit, allowing data to be easily surfaced in your applications—for Sales, Service, and Marketing



Benefits of Customer 360



Empower your organisation with insights from behavioural and demographic data, enabling informed decisions. Safeguard your data with full GDPR and POPIA compliance, while leveraging comprehensive reporting to drive impactful, data-driven outcomes.

The Total Economic Impact™ of Microsoft Dynamics 365 Customer Insights

Explore the advantages of Dynamics 365 Customer Insights in this commissioned study conducted by Forrester Consulting.

324%

ROI over three years

75%

Time savings on customer journey development

15%

Improvement to conversion rate per customer journey

6months

to payback

[Download the Report](#)

Discover the cost savings and business benefits enabled by Dynamics 365 Sales, including:

215%

return on investment (ROI) over three years

15%





increase in seller efficiency when collaborating with a team member

7 months

months to payback

[Download the Report](#)

Why Why Customer 360 is important across the organisation:

 <p>Data Wrangler (Unlock a single view of a customer)</p> <ul style="list-style-type: none"> ▶ Get a unified view of customers ▶ Pinpoint your audience ▶ Use predictive insights ▶ Track and measure KPIs 	 <p>Marketer (Create relevant real-time journeys)</p> <ul style="list-style-type: none"> ▶ Build journeys faster ▶ Personalise every experience ▶ Create new segments ▶ Nurture leads in real time 	 <p>Seller (Enhance sales with greater intelligence)</p> <ul style="list-style-type: none"> ▶ Build a shared vision ▶ Close faster and build loyalty ▶ Continue the conversation ▶ Enable greater visibility 	 <p>Service Agent (Improve agent insights and case management)</p> <ul style="list-style-type: none"> ▶ Understand customer context ▶ Stay up to date on disruptions ▶ Deliver personalised service
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<p>“Customer insights is a best-in-class product for a company seeking speed to market in its customer initiatives.”</p>	<p>“With [real-time] customer journey orchestration, our agents can spend less time gathering information and more time resolving customer issues.”</p>	<p>7% increase in close rates Sellers were 15% more efficient when collaborating with team members</p>	<p>73% decrease in average agent handling time 50% time saving due to improved agent productivity 15% improvement in first call resolution</p>
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Choose which business unit you want to start with. Be it marketing, sales, or customer service. Customer Insights can be utilised in one business unit and then scaled across the entire organisation.

the **Greenwheels** methodology



Greenwheels is our strategic implementation methodology that is designed to streamline and optimise the delivery process. It emphasises structured planning, accountability, and clear communication to ensure that projects are completed on time and meet all predefined criteria.

By following a strict sequence of phases, Greenwheels protects all stakeholders, reducing risks, resolving issues efficiently, and ensuring a smooth and successful rollout.

Why Greenwheels works:

▶ **Structured Processes:**

When the wheels are green, the project has gone through our structured methodology, ensuring everything is properly organised and managed.

▶ **Clear Acceptance Criteria:**

Acceptance criteria are solidified before delivery. Any issues during testing must be addressed through rework if criteria are not met.

▶ **Efficient Delivery:**

We plan meticulously ensuring work is completed on time and meets the acceptance criteria.

▶ **Detail-Oriented Execution:**

Every item is detailed, planned, and executed with precision, providing a well-defined work plan that supports effective team delivery.

▶ **Impact on Delivery:**

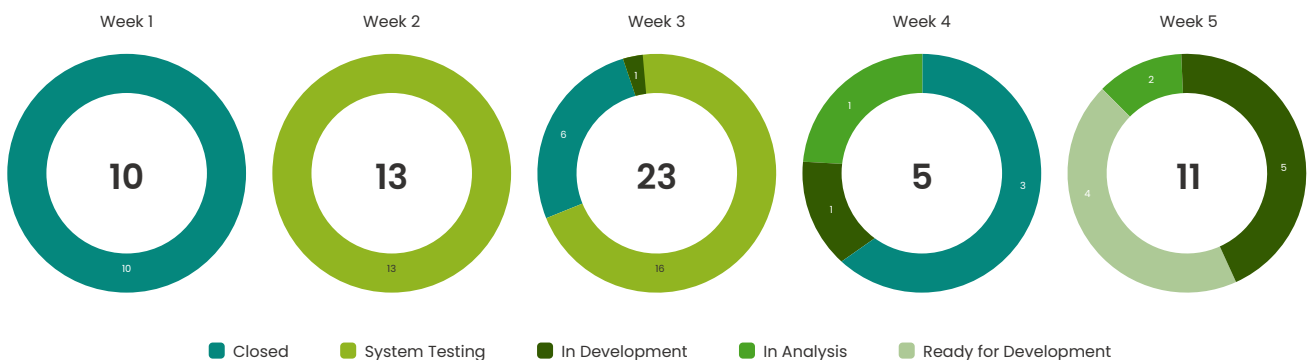
This methodology helps prevent project delays and reduces pressure later in the project timeline.

▶ **Team Support:**

The structured approach supports the team by clarifying tasks, reducing uncertainty, and enabling more effective work planning.

▶ **Improved Communication:**

Enhances communication with clients by providing detailed evidence of progress.



Customer Success

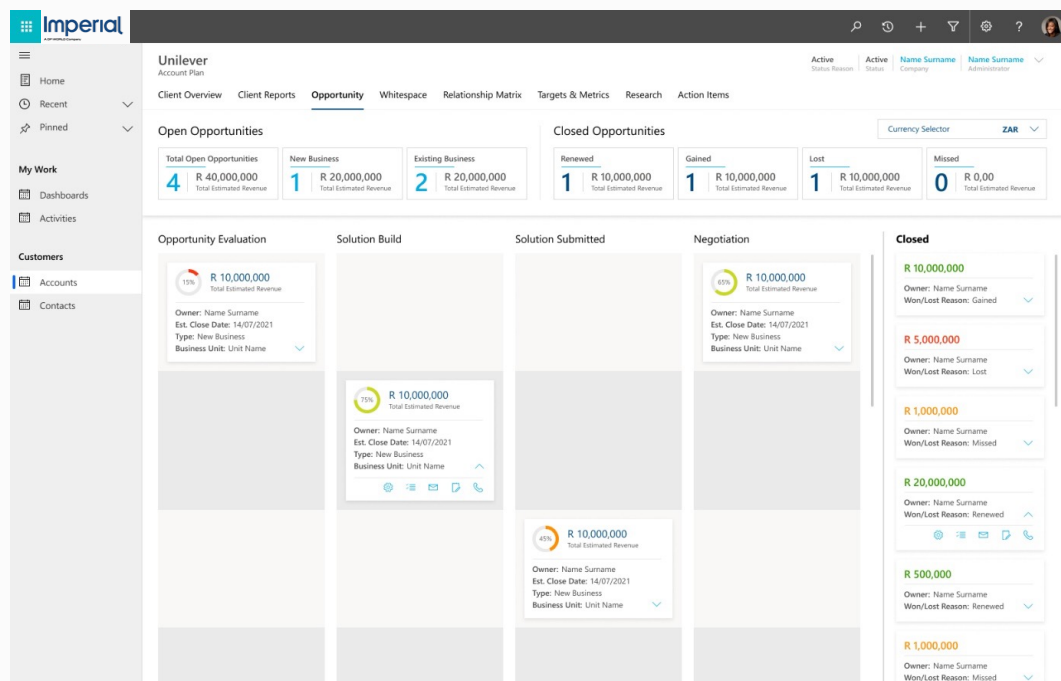
Imperial

A DP WORLD Company

Imperial sought a Group sales pipeline tool that provided detailed current data for accurate forecasting.

Key questions included:

- ▶ Are we winning or losing deals?
- ▶ What is the projected revenue over the next 12-month and 3-year period?
- ▶ What sector is contributing most to overall revenue?
- ▶ Which opportunities are 50% closed?



After 12 weeks of design, change management and project implementation, they successfully adopted a CDP that manages sales across their 36 South African operating companies in South Africa. When the European office saw the solution, they asked us to roll out Microsoft Dynamics 365 as a CDP to all international regions across the globe.

With the development of AI and the ability to speak to your data in natural language, sellers and managers get a wider spectrum of reporting, analytics and data insights than ever before.

“ Overall satisfaction... always professional and comfortable to be honest in our communication. ”

Zeurika Savage, Imperial

Get started with Vision and Value

Vision and Value, previously known as Catalyst, is a strategic framework designed to elevate customer experience across all departments and functions within an organisation. This approach provides a comprehensive Customer-360 solution, enabling businesses to unify their customer data, streamline processes, and deliver consistent, personalised experiences.

Vision and Value helps companies identify key challenges, co-create solutions, and implement technology that drives measurable business value by leveraging Microsoft's powerful CRM tools.

Vision and Value is a transformative initiative that empowers organisations to break down silos, align teams, understand the capabilities of technology, future-proof and create mutual expectations across customer engagement strategies. IT ensures that your chosen solution is viable and will provide benefit.

Key Benefits of the Microsoft Vision and Value Process:

- ▶ **Holistic Problem-Solving Approach:**
Identify the specific pain points, ensuring resources are allocated effectively within budget
- ▶ **Bridging the Technology Knowledge Gap:**
Understand the extensive capabilities of integrated tools like Azure, Microsoft 365, and Dynamics 365 to tackle specific business problems and aid in achieving operational goals.
- ▶ **Breaking Down IT Silos:**
Encourage collaboration across departments, aligning technology initiatives under a unified customer strategy that enhances overall organisational effectiveness.
- ▶ **Strategic Alignment:**
Vision and Value ensures that the chosen technology investments deliver maximum value and facilitate sustainable growth.
- ▶ **Long-Term Value Creation:**
Shift from reactive problem-solving to proactive innovation, with a framework for continuous improvement and adaptability.

This Engagement could potentially be funded - but funding is VERY limited.

We urge you to explore these options to design a solid business case that will answer if an ITSM project will give ROI and if Microsoft Dynamics 365 is the best solution for your organisation.

[Download the Vision & Value Deep-dive for more information.](#)

Contact information:

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[Book a Discovery Call](#)

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About Enterprisecloud

Enterprisecloud is a highly specialised Business Applications Solutions Partner that focuses solely on Dynamics 365 and Power Platform implementations for Sales, Service, and Marketing within industries such as Higher Education, Financial Services, Logistics, and Retail. We service our clients around the world, from South Africa.



Microsoft Dynamics

CUSTOMER ENGAGEMENT
PARTNER OF THE YEAR
WINNER

2021



Microsoft Dynamics

CUSTOMER ENGAGEMENT
PARTNER OF THE YEAR
FINALIST

2022



Microsoft Dynamics

INDUSTRY SOLUTION
PARTNER OF THE YEAR
(NON-PROFIT)
WINNER

2022

**Book a
Discovery Call**