

techvista
A Systems Limited Company

ENABLING A
DIGITAL TOMORROW

Dynamics 365
Customer Insights



Table of Contents

1

Changing Trends

2

Customer Data Platform As a Solution

3

Microsoft Dynamic 365 Customer Insights

4

Features & Significance of Dynamics 365 Customer Insights

5

What Sets Microsoft Apart?

6

Why TechVista?



Changing Trends

Winning and keeping customers is becoming challenging

5x higher cost of acquiring new customers as compared to retaining old ones

([Deloitte](#))



Consumer experiences are changing



Flight to digital

17% increase in e-commerce sales in 2022.

([Gartner](#))



Shattering of brand loyalty

75% of consumers tried new shopping behaviors, **39%** of them deserted trusted brands for new ones.

([McKinsey](#))



Shift in purchase drivers

64% of consumers cite convenience while **57%** cite value as top drivers for their purchases.

([McKinsey](#))

Data privacy concerns

69% of consumers are concerned about how personal data is collected in mobile apps.

([Forbes](#))

Consumers are asking for the right to “opt-out” of data collection



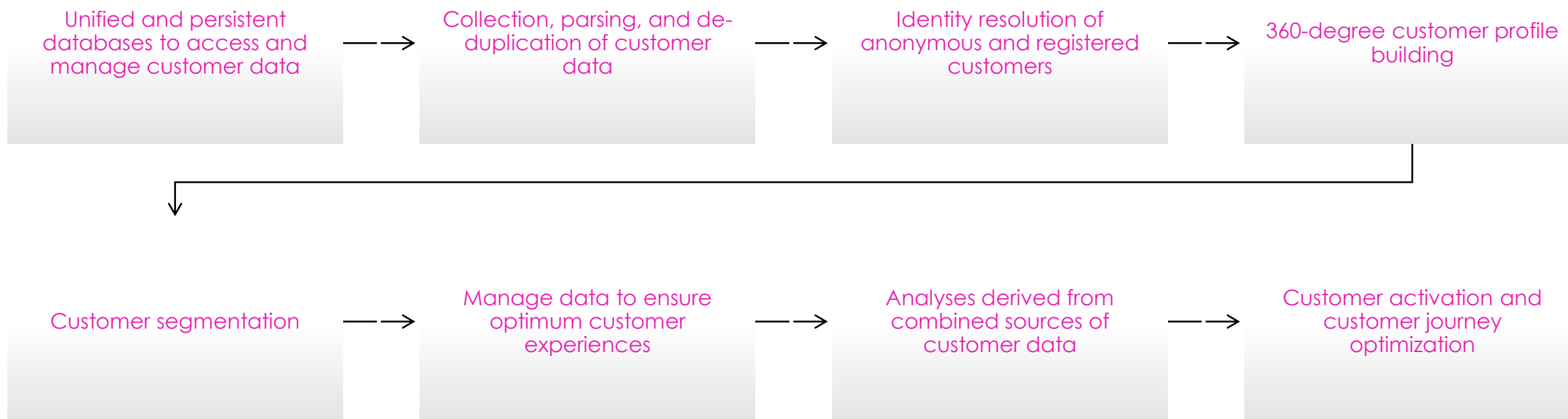
Customer data challenge

- Having the ability to bring together data from both the digital and physical worlds at a global scale
- Overcoming incomplete or inaccurate customer data
- Unlocking digital intelligence using AI/ML-driven modeling.

(Forbes)



A solutions require capabilities:



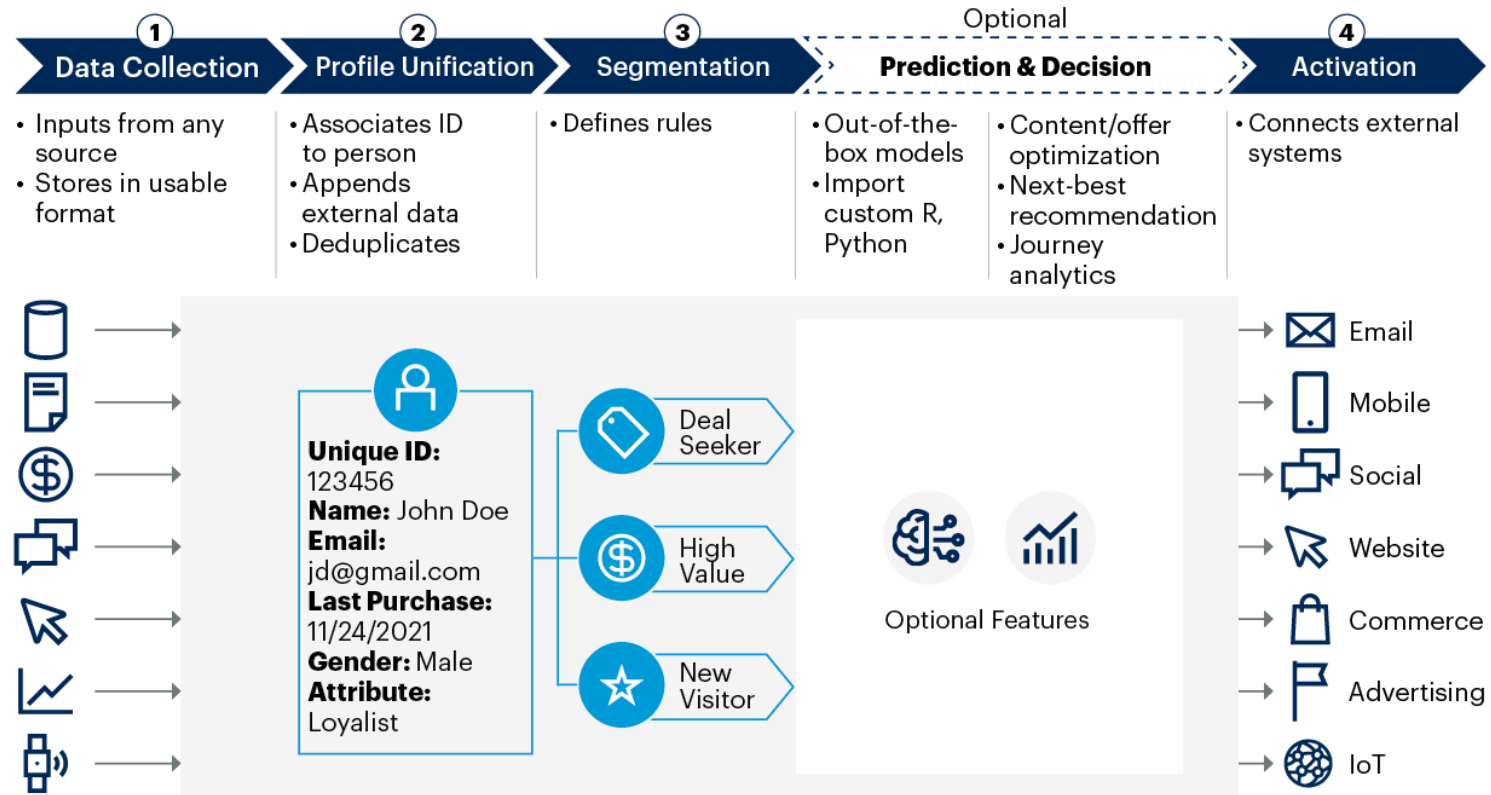


Proposed Solution

Customer Data Platform as a Solution

CDP is a collection of software that creates a persistent, unified customer database that is accessible to other systems.

Features of Customer Data Platforms



Source: Gartner
725524_C

Microsoft Dynamic 365 Customer Insights



“Empower every organization to understand its customer data to derive insights that power personalized experiences and processes”





Capabilities

Get a complete view



Pre-built line-of-business connectors

Additional Power Query connectors

Connect Common Data Model folders

Bring our own data lake

Customer Insights Environment Demo

You're viewing sample data. Customize what you see by connecting to your own data. For licensing options, contact sales. [Sign up for trial](#)

Run Save Discard changes

Unify

Map **Match** Merge

Define your rules for the matching and deduplication process that will consolidate source records into unique customer profiles. Successful Updated: 5 months ago

Unique source records
40,000
After removing 0 duplicate records
How does deduplication work?

Matched and non-matched records
10,000
Including 0 singleton (non-matched) records
How are links determined?

Matched records only
10,000
Excluding 0 singleton (non-matched) records
What happens to excluded records?

View last run

Matched records details

+ Add entity Custom View

| Order | Name | Source records | Unique records | Records matched | Include all records |
|------------|---|----------------|----------------|-----------------|-------------------------------------|
| 1 | Dynamics : Contacts | 10,000 | 10,000 | | <input checked="" type="checkbox"/> |
| 2 | POS : Customers | 10,000 | 10,000 | 100.0% matched | |
| 1 | E-Mail+FullName | | | 100.0% | |
| + Add rule | | | | | |
| 3 | Website : WebsiteUsers | 10,000 | 10,000 | 100.0% matched | |
| 1 | FullName+Telephone | | | 100.0% | |
| + Add rule | | | | | |
| 4 | IntelligenceOutputData : HolidaySpecialInterest | 10,000 | 10,000 | 100.0% matched | |
| 1 | HolidayInterestCustomers | | | 100.0% | |
| + Add rule | | | | | |

Deduplicated records details

Data unification

Multi-billion \$, leading bedding retailer in the US with more than 2,600 B&M stores across the country

Main Challenges:

Lack of a unified platform for customer analytics and insights

Inability to stitch customer data obtained from multiple sources

Customer touchpoints were not captured and modelled

No customer Master Data Management process in place

Downstream applications could not cater to customer centric use cases

Statistics:

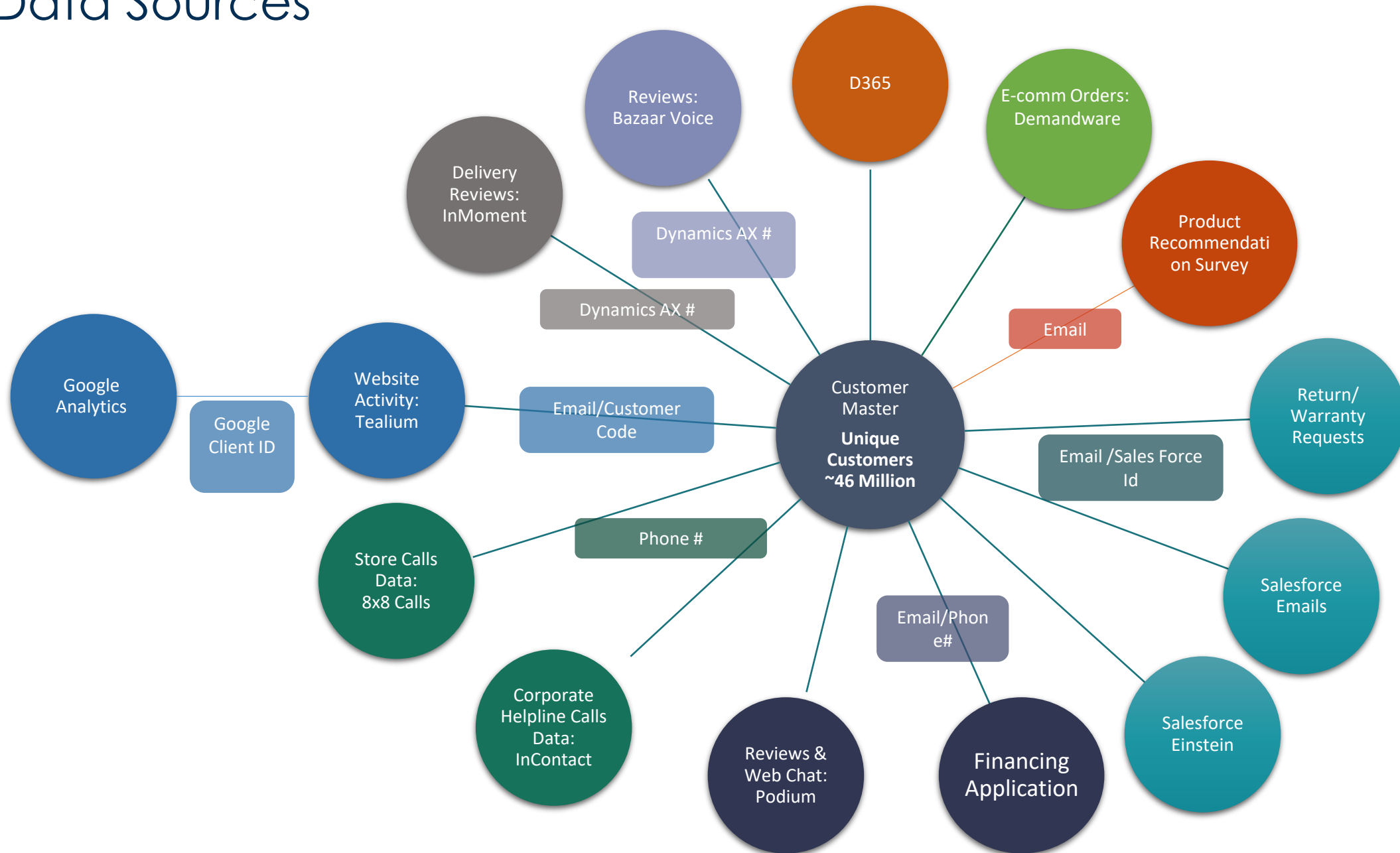
Total Customers
100.8 M

Unique Customers After
Deduplication
46.3 M

Total Data Sources
24

Total Record Processed
301.9 M

Data Sources



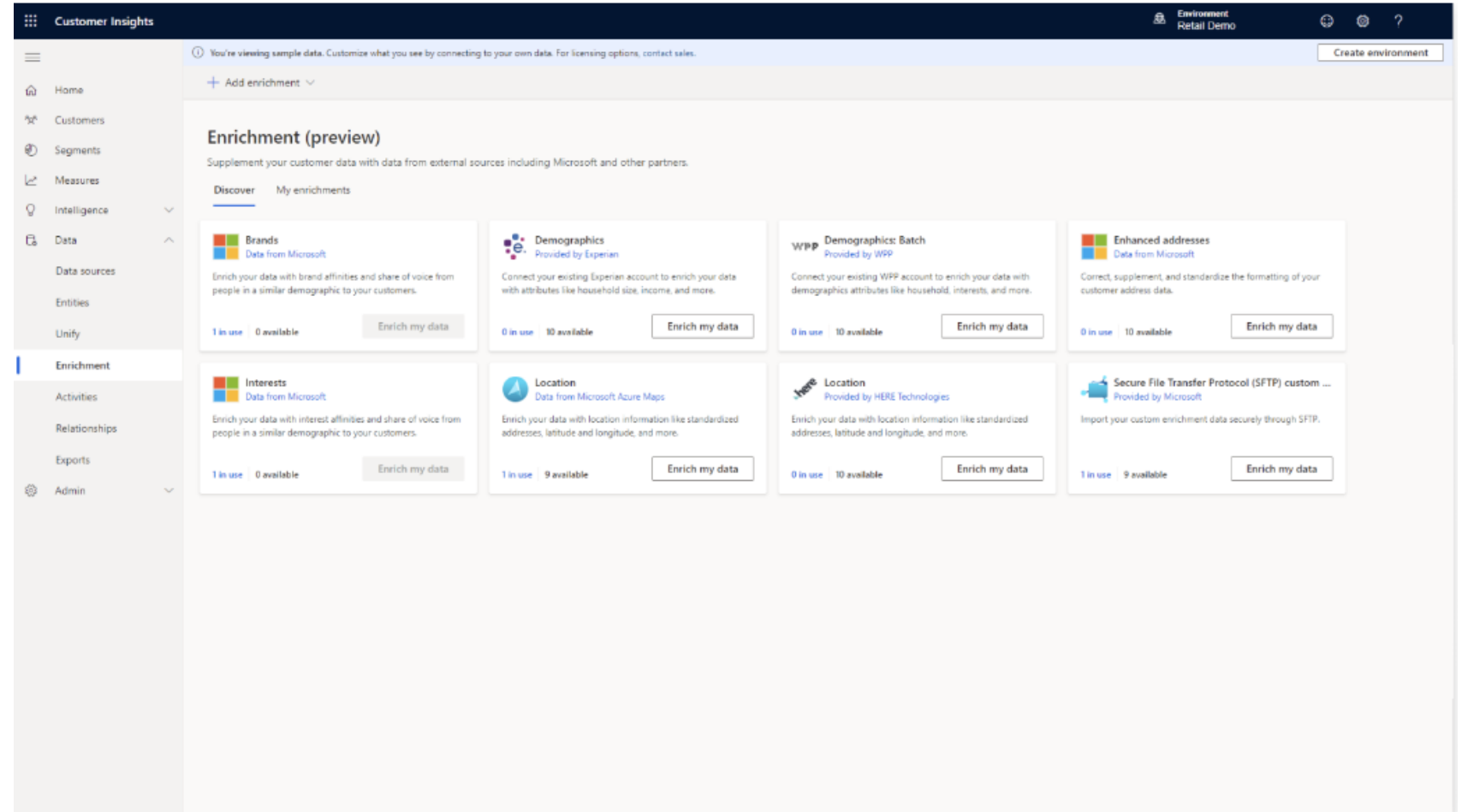
Enrich

Proprietary audience intelligence

Third party data providers

Aggregation with Office 365 data

SFTP custom import



Power end to end customer experiences

Customer Insights

Customers

Patti Melendez
Seattle, WA, United States
Last activity: 4/12/2021

Customer ID: 020938672344c49823409r83314
Rewards number: 2,218,411
Member since: 3/12/2019
Birth data: 7/20/1997
Address: 1108 23rd Ave S, Seattle, Washington, USA
Favorite time of day: Afternoon
Preferred payment: Credit card
Mobile app user: Yes
Gender: Female
Email consent: Yes

Timeline

Search Filter

- Online order** 4/12/2021
\$46.78
4 items
- POS Purchase** 3/28/2021
\$16.20
1 item
- Online order** 3/24/2021
\$36.35
3 items
- Redeemed offer** 3/23/2021
Guac
Birthday
- POS purchase** 1 month ago
\$14.54
1 item
- Customer service call** 1 month ago
[Call notes](#)

Segments that include Jane

- High value customer [Go to segment](#)
- GuacLovers [Go to segment](#)
- POS customers [Go to segment](#)

Recommended product

Guacamole

Favorite order

Chicken tacos

CLTV

\$862.63

Total orders

55

Data-Driven Transformation



Problem Statement

Required a mechanism for unifying and deduplicating customer data to create golden records and 360° customer views.



Approach

- Integrated all systems to provide an enterprise data view
- Implemented Customer Master Data Management (MDM) to create a persistent, unified customer database
- Established AI and ML algorithms to drive customer retention rates
- Optimized Customer Conversion and LTV
- Provide Customer Data Services for improved customer satisfaction and services



Results

Data-Driven Culture and Strategic advantage contributed to following results;

26% Increase in customer retention year over year

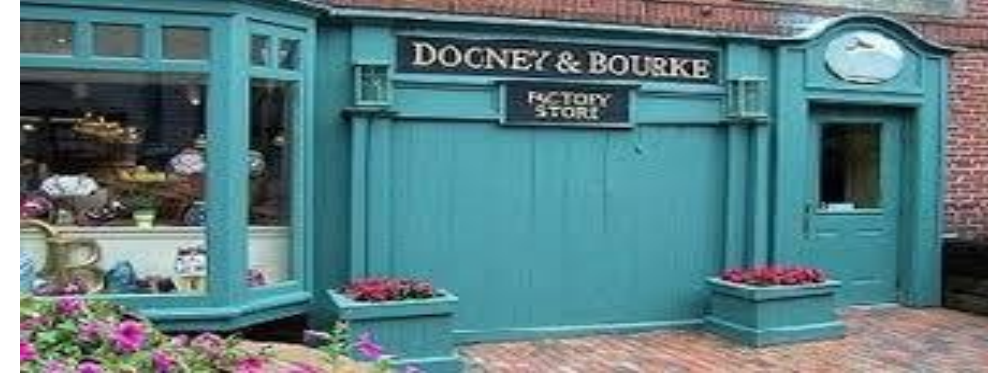
15% Increase in new customer acquisitions year over year

19% Sales increase year over year

33% Achieved merged and de-duped customer master data set

Analyzed Market Basket to identify best-fit products

Analysis uncovered logistics opportunities to optimize supply chain delivery efficiencies



Azure Data Factory



databricks



Azure Data Lake Storage Gen2



Power BI

Consent enabled – Build trust

- Import and manage consent data
- Establish consent attributes in profiles
- Create consent-enabled segments

The screenshot displays a web-based interface for creating segments. At the top, a dark blue header shows 'Environment Demo'. Below it, a light blue banner contains the text: 'You're viewing sample data. Customize what you see by connecting to your own data. For licensing options, contact sales.' Navigation links for 'Back', 'Undo', 'Redo', and 'Project attributes' are visible. A main instruction reads: 'To create a segment in SQL, go the Segments page and click '+New''. The central area is titled 'Untitled segment' with an 'Edit details' link. Below this, a sub-header states: 'Create rules to group customers into segments by their attributes. Related attributes and segments shown in the side panel can be added into your rule as you build.' A rule configuration box for 'Rule 1' shows the condition: 'ContactProfile : CustomerInsights.Consent is equal to true' with an 'Ignore case' checkbox. Below the rule box are '+ Add condition' and '+ Add subrule' options. At the bottom of the rule box is '+ Add rule'. On the right side, a vertical list of attributes and segments is visible, including 'Azure : Custo', 'Case : Transac', 'ContactProfil', 'Id', 'SourceId', 'EntityNan', 'Customer', 'ContactId', 'FirstName', 'LastName', 'BirthDate', 'Gender', 'PrimaryEn', 'PrimaryPr', 'Contacts : CRI', 'Customimpor', 'Microsoftacc', 'Microsoftenh', 'Orders : Trans', 'Rewardspoint', 'SegmentMen', 'Shipping : Tra', 'Subscription :', 'Totalspendpe', 'Totalspendpe', and 'UnifiedActivit'. At the bottom of the interface are 'Run', 'Save', and 'Cancel' buttons.

Enrich with Affinities

- Identify highest affinities
- See SoV across brands and interests
- Richer profiles, better segmentation

Customer Insights

← Back to Entities ↓ Download

Customer Insights

BrandAffinityFromMicrosoft

Attributes Data

| Name ↑ | Data type | Type | Summary |
|------------------------------|-----------|------|---------|
| AffinityLevel | | | |
| AffinityScore | | | |
| AgeDemographicSegment | | | |
| Brand | | | |
| CityDemographicSegment | | | |
| CountryDemographicSegment | | | |
| CustomerId | | | |
| EnrichmentRunId | | | |
| GenderDemographicSegment | | | |
| Id | | | |
| Industry | | | |
| PostalCodeDemographicSegment | | | |
| StateDemographicSegment | | | |

Overview of Brand

Unique count and chart values are approximate.
Updated: 21 hours ago Last run

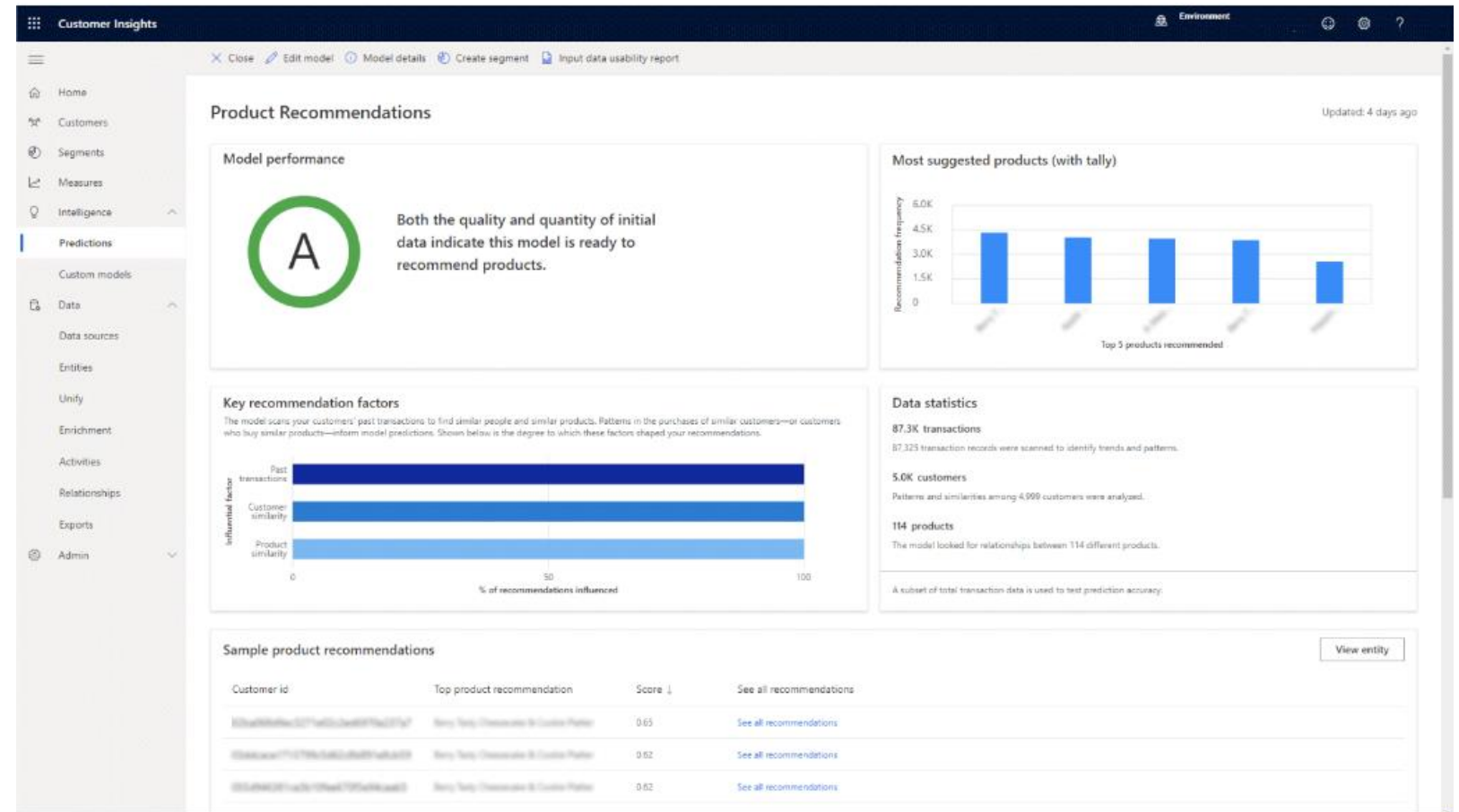
| Attribute info | |
|----------------|----------|
| Unique | 4 (0.4%) |
| Error | 0 |
| Missing | 0 |
| Total | 1,137 |

Top values by count

| Brand | Count (approx.) |
|----------------|-----------------|
| Starbucks | 600 |
| Dunkin' Donuts | 300 |
| Keurig | 100 |
| Peet's Coffee | 50 |

Prebuilt AI models

- Transaction & subscription churn
- Next best product recommendations
- Customer lifetime value
- Sentiment Analysis



Predictive analytics

Holiday Sales Uplift Driver Analysis

- Predictive / Prescriptive decisioning workflow to capture **sales uplift drivers** in **High Traffic Days** & help with Prescriptive analytics to capitalize on such events e.g. **Christmas and New Years Holidays**
- Identify market opportunity pockets in terms of brand tiers and retail channels (where to invest to avail more conversions?)
- Use of statistical deviation scores to mine significant sales uplift drivers

Brand Battleground

All

Luxury

Prestige

Massstage

All

Filter Criteria

Median Sales Filter

No. of Products

Median Sales Filter

Mean Sales Filter

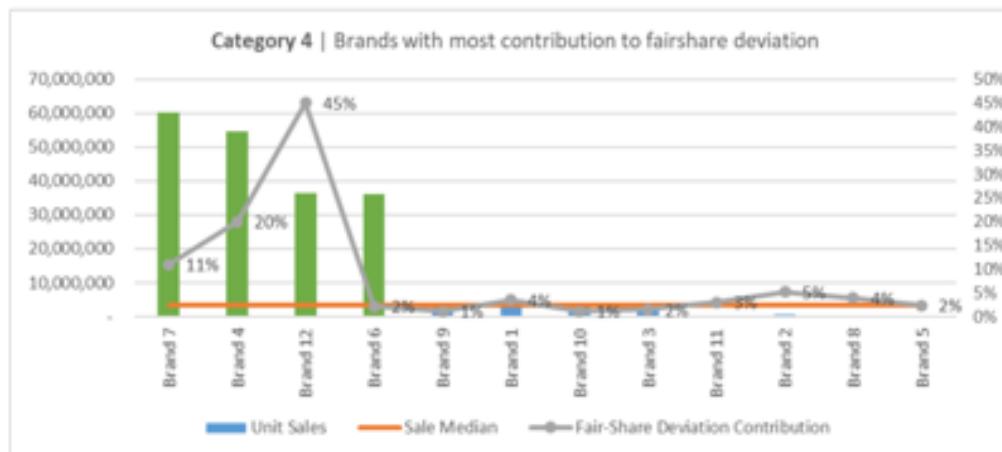
Top N Percentile

Greater than X Sales Last Year

Greater than X Units Sold Last Year

Greater than X Units Sold Last Year

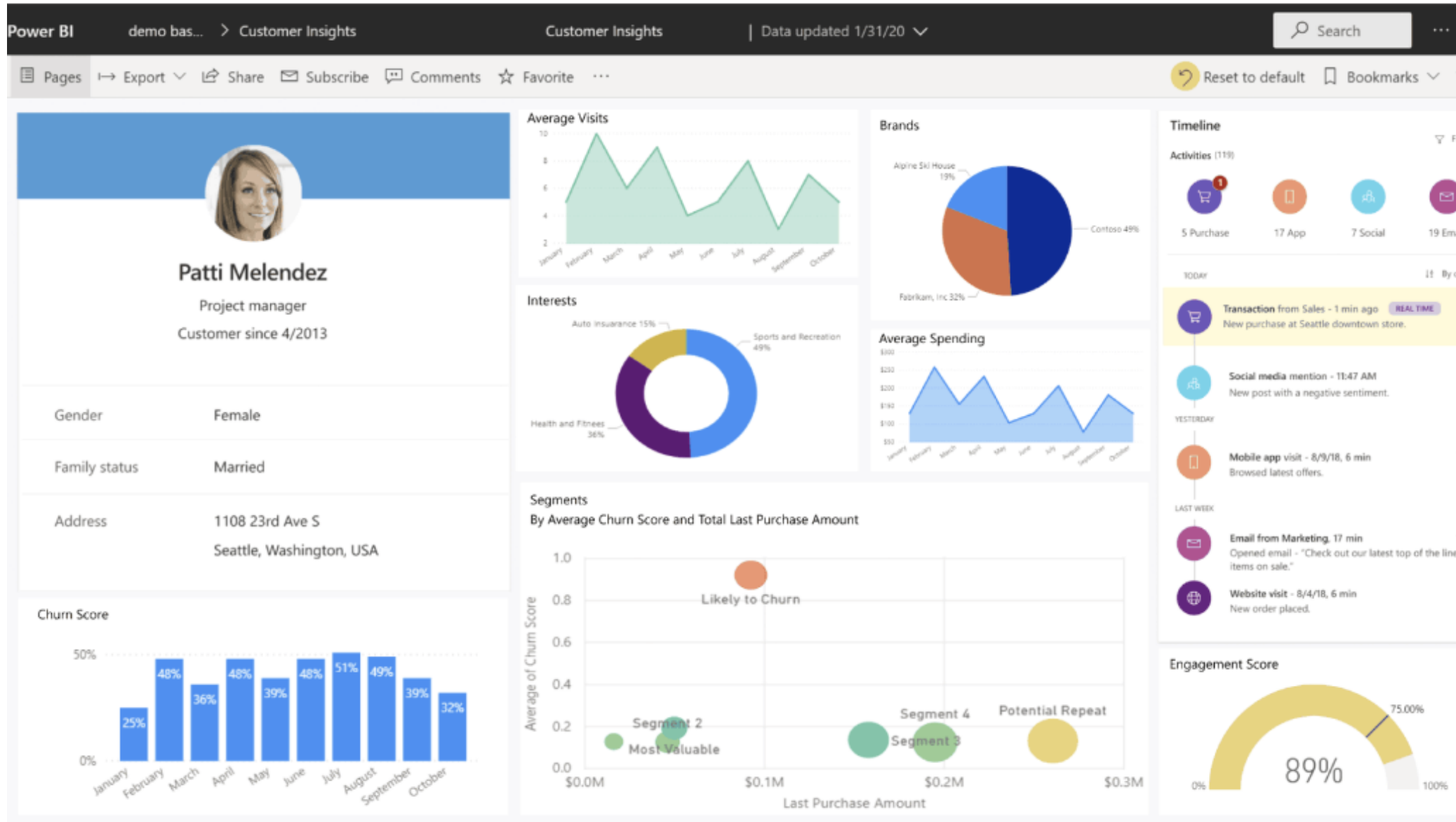
Marketing Spend Budget



Pocket of Opportunity
Brands with most contribution in fair-share deviation score and with high magnitude is sales, provide a pocket of opportunity. These are optimal candidate for corrective Category Tactics as they will have the most ROI. E.g. positioning, assortment, marketing spend, pricing.



Unlock powerful insights



Customer segments

- Create groups based on attributes
- Discover segments using AI-modeling
- Gain insights and understand activity
- Find look-alike customers

The screenshot displays the 'Customer Insights' dashboard. The left sidebar contains navigation options: Home, Customers, Segments (selected), Measures, Intelligence, Predictions, Custom models, Data, Data sources, Entities, Unify, Enrichment, Activities, Relationships, Exports, and Admin. The main content area is titled 'Segments' and shows a list of AI-generated suggestions. A notification at the top states, 'You're viewing sample data. Customize what you see by connecting to your own data. For licensing options, contact sales.' Below this, there are buttons for 'Find new suggestions', 'Edit suggestions', and 'Refresh suggestions'. The 'Segments' section includes tabs for 'All segments', 'Suggestions (preview)', and 'Insights (preview)'. A text block explains that segment suggestions are generated by an AI model using customer attributes. The suggestions are sorted by 'Percentage: High to Low' and are generated on 9/30/20. Six suggestions are displayed in a grid, each with a title, member count, and key attributes.

| Segment Title | Members | Key Attributes |
|------------------------------------|---------------|--|
| LifetimeValue is 64% above average | 1.2M members | • Occupation is Accountant • YearlyIncome is greater than \$150,000 • N_years_customer is greater than 10 |
| LifetimeValue is 58% above average | 3.4M members | • Occupation is Accountant • YearlyIncome is greater than \$130,000 • + 2 other influencing attributes |
| LifetimeValue is 52% above average | 5.4M members | • Occupation is lawyer • YearlyIncome is greater than \$130,000 • + 1 other influencing attributes |
| LifetimeValue is 38% above average | 8.7M members | • Occupation is Accountant • N_years_customer is greater than 3 • + 1 other influencing attributes |
| LifetimeValue is 32% above average | 9.2M members | • YearlyIncome is greater than \$100,000 • N_years_customer is greater than 2 • + 2 other influencing attributes |
| LifetimeValue is 28% above average | 12.7M members | • Occupation is doctor • NumberCarsOwned greater than 2 • + 2 other influencing attributes |

Understand customer journey

- Delve into your customer journey
- Eliminate friction with next best everything

The dashboard displays the following information:

- Product Recommendations** (Updated: 4 days ago)
 - Model performance:** Grade A. Text: "Both the quality and quantity of initial data indicate this model is ready to recommend products."
 - Most suggested products (with tally):** A bar chart showing the top 5 products recommended. The y-axis is "Recommendation frequency" ranging from 0 to 6.0K. The top product has a frequency of approximately 4.5K.
 - Key recommendation factors:** A horizontal bar chart showing the percentage of recommendations influenced by three factors: Past transactions (~100%), Customer similarity (~100%), and Product similarity (~100%).
 - Data statistics:**
 - 87.3K transactions:** 87,325 transaction records were scanned to identify trends and patterns.
 - 5.0K customers:** Patterns and similarities among 4,999 customers were analyzed.
 - 114 products:** The model looked for relationships between 114 different products.
 - Note: A subset of total transaction data is used to test prediction accuracy.
- Sample product recommendations**

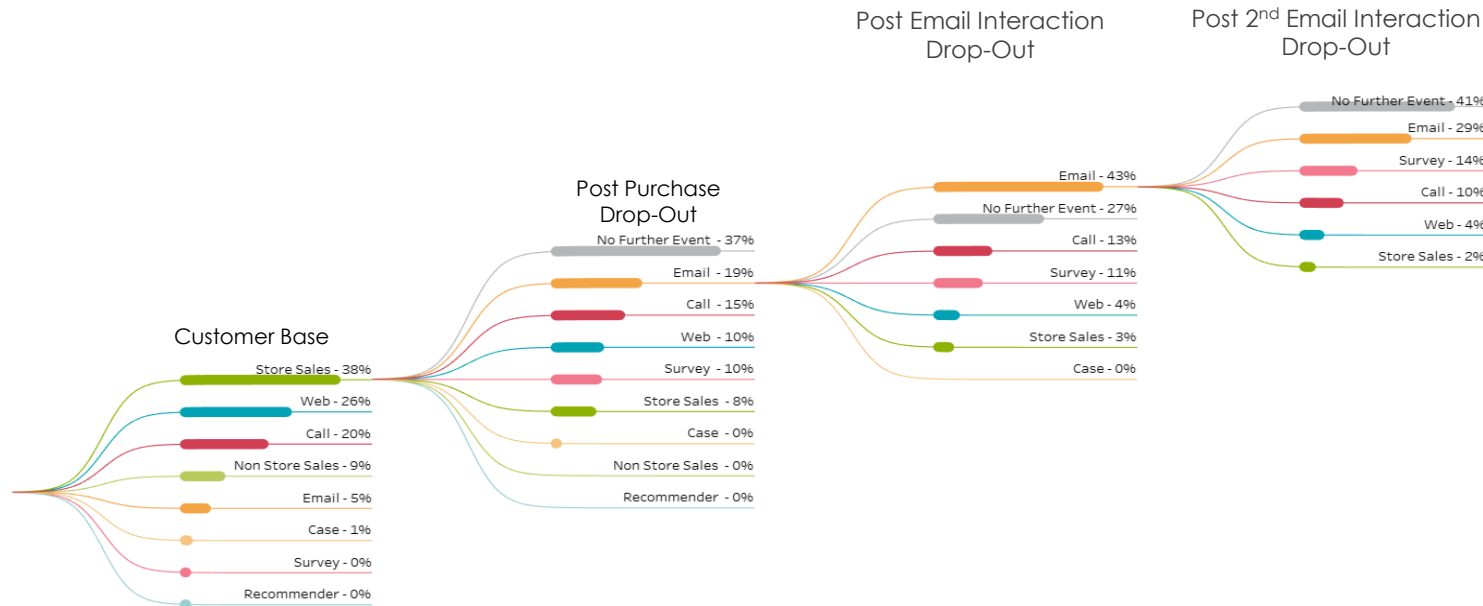
| Customer id | Top product recommendation | Score ↓ | See all recommendations |
|----------------------------------|----------------------------------|---------|---|
| 00000000000000000000000000000000 | Very Nice Dresses & Coats - Pink | 0.65 | See all recommendations |
| 00000000000000000000000000000000 | Very Nice Dresses & Coats - Pink | 0.62 | See all recommendations |
| 00000000000000000000000000000000 | Very Nice Dresses & Coats - Pink | 0.62 | See all recommendations |

Use Case: Customer Journeys

Analyzing Customer Drop-out Rates

Exploring drop-out rates allows organizations to analyze:

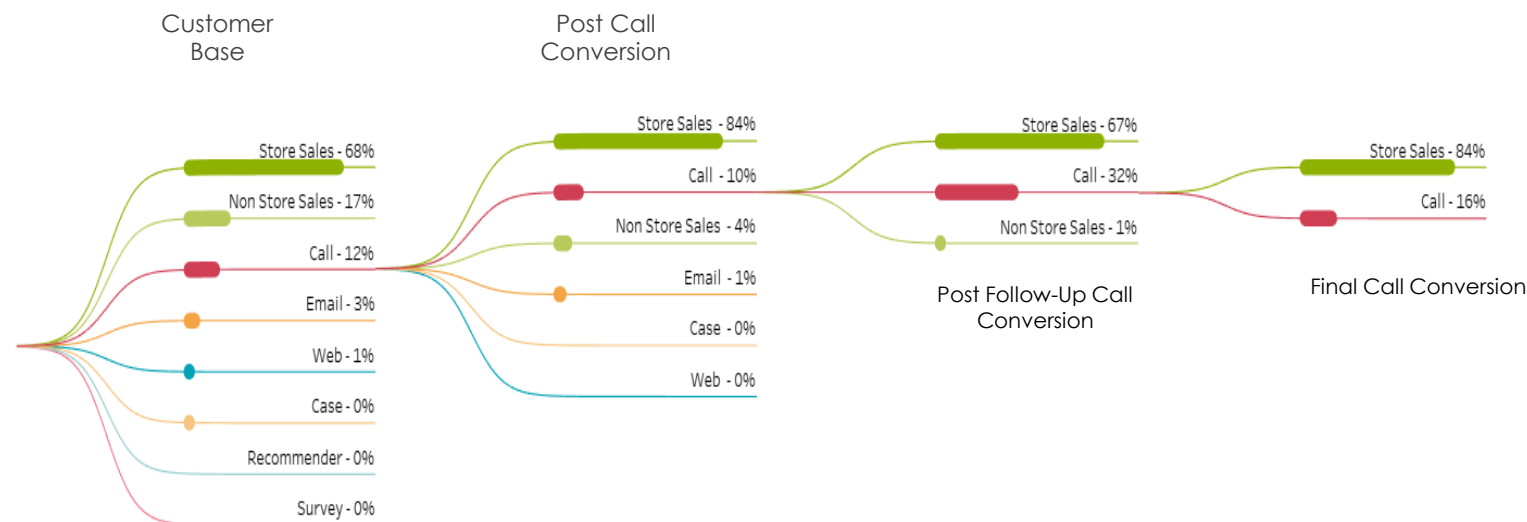
- Stages where customers are dropping out
- Identify bottlenecks that may be impeding customers' purchase journey



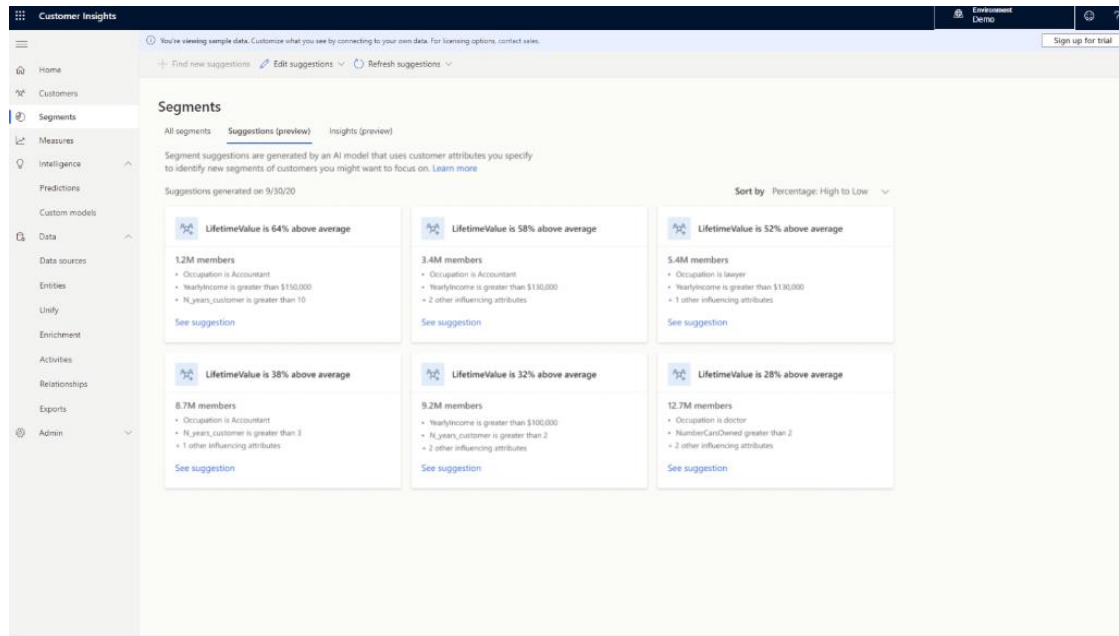
Analyzing Customer Journeys Post Marketing Call Engagement

Analyzing customer journeys after a marketing interaction allows organizations to understand:

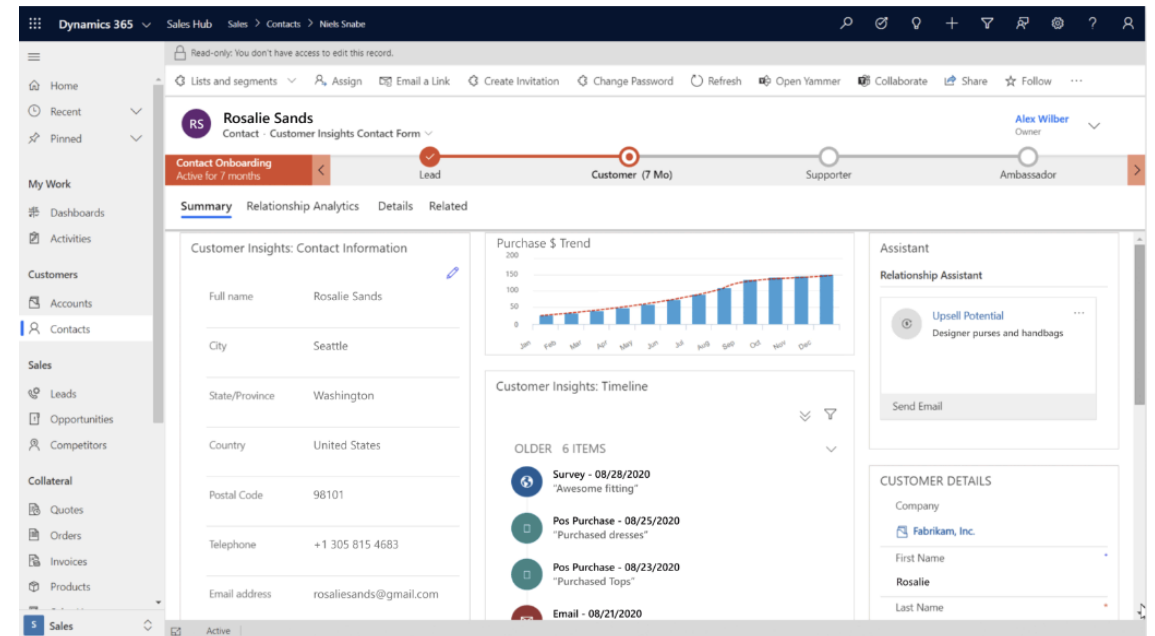
- Effectiveness of different marketing mediums
- Types of customers for which certain mediums are effective or ineffective
- Mediums more likely to lead to a purchase



Predict



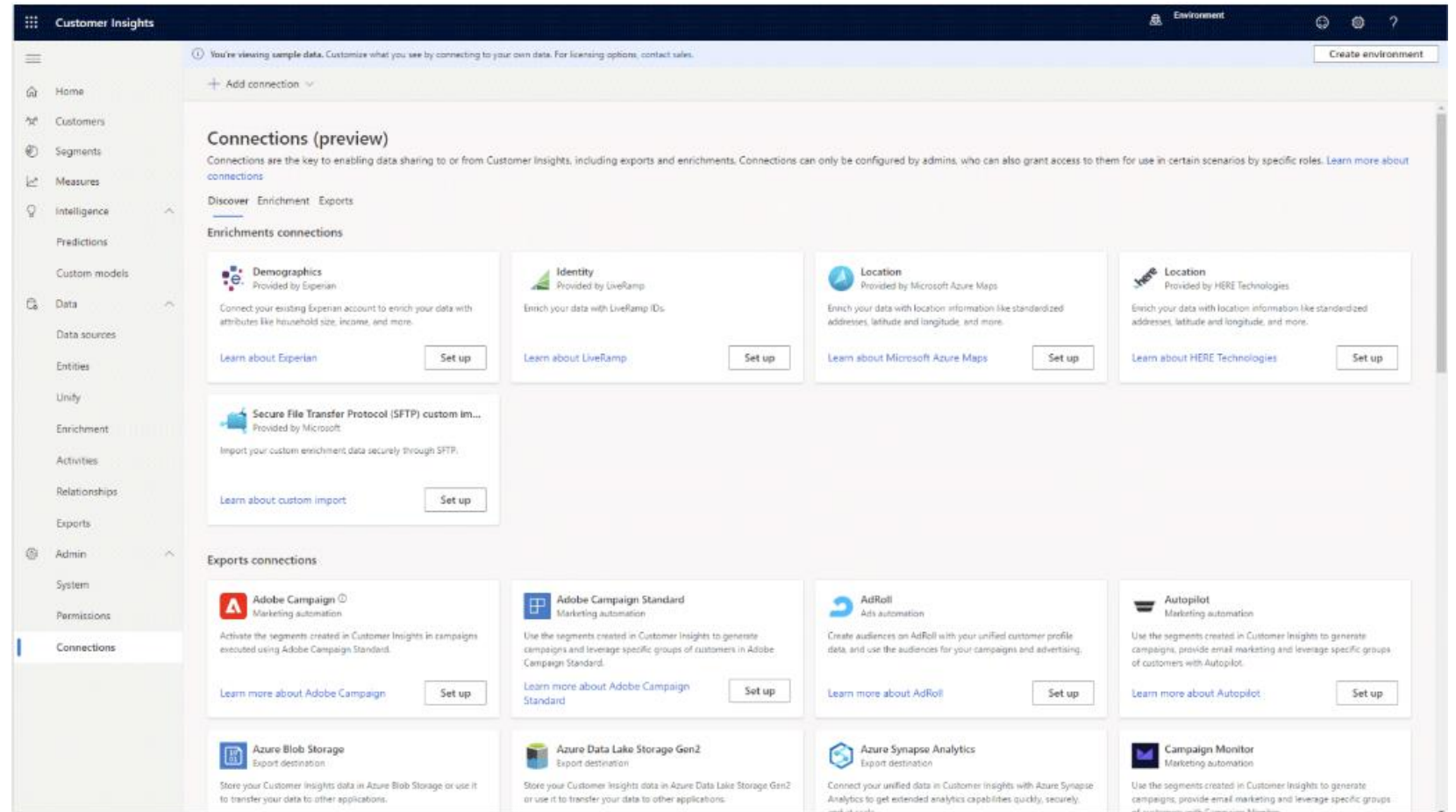
Create richer segments



Predict customer intent

Activation

- Export unified data to business apps
- Share B2B and B3C segments
- Automate data exports
- Engage customers like never before



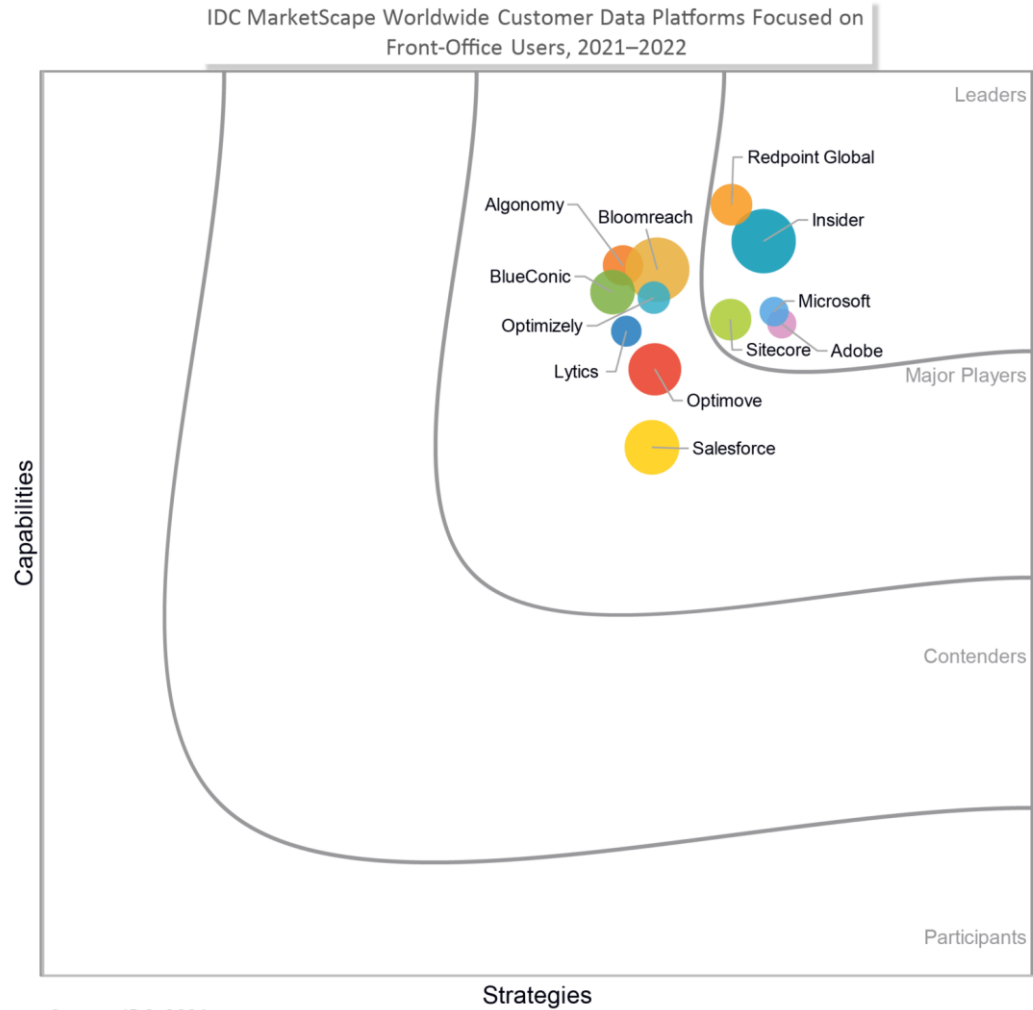
Drive meaningful actions





What sets Microsoft Apart?

Analysts rate Microsoft as industry leader



Source: IDC, 2021



Analysts suggest, customers confirm Microsoft as industry leader



"Customer Insights is going to help us match up what offering makes sense for what segment."

Evan Howell,
Director of Sales Initiatives and Market Analytics, AEP Energy



"We can be faster about getting insights about our donors. We can act fast on our data."

Michiel van Straten,
Senior Data Analyst, UNICEF Netherlands



"The packaged solution, with artificial intelligence and machine learning, enables us to quickly and easily unify customer data scattered across multiple systems."

Bernt Bisgaard Caspersen,
Head of Solution Team and Architecture, Tivoli





Why TechVista?

Delivering Seamlessly for a Digital Tomorrow

\$600 M+

Market Capitalization

8500+

Employees Globally

138+

Global Active Clients

techvista
45+ Limited Company

Years In Business

Systems is a premier digital technology solutions provider with a team of over 8500 brilliant minds globally who continue to innovate in building leading enterprise solutions that ensure a promising future of our customers' digital footprint for sustainable growth and profitability. We are passionate about solving our customers' challenges using customized, scalable, and efficient products and services. Our people are our promise and method for driving global digital engagement. As a digital technology services provider, we encourage the free sharing of ideas throughout Systems.

Our ability to improve, accelerate, and generate key competencies is driven by our investment in our people. When Systems thrives, everyone benefits.



Subsidiaries and Affiliates:

- Systems Limited
- Systems Middle East (Techvista)
- Systems Qatar (Techvista)
- Systems Arabia
- Systems Misr
- Systems APAC (TechVista)
- Systems ASEAN
- Systems Ventures
- Visionet (North America, Europe, UK)
- OneLoad

Our Prestigious Accolades



Top of Microsoft's most strategic Business Applications partners two years in a row



Best Under A Billion three years in a row



Partner of the year 2020



Received SAP® EMEA S Partner Excellence Awards 2022 for Top New Partner and Service Excellence



Two awards in "Most Outstanding Company"



Recognized in ClickDimensions Top 10 Revenue - Global award category



Digital Transformation, Cloud Enablement & Data-Driven Service Portfolio



Success-Proof Methodologies



Strong Partner network

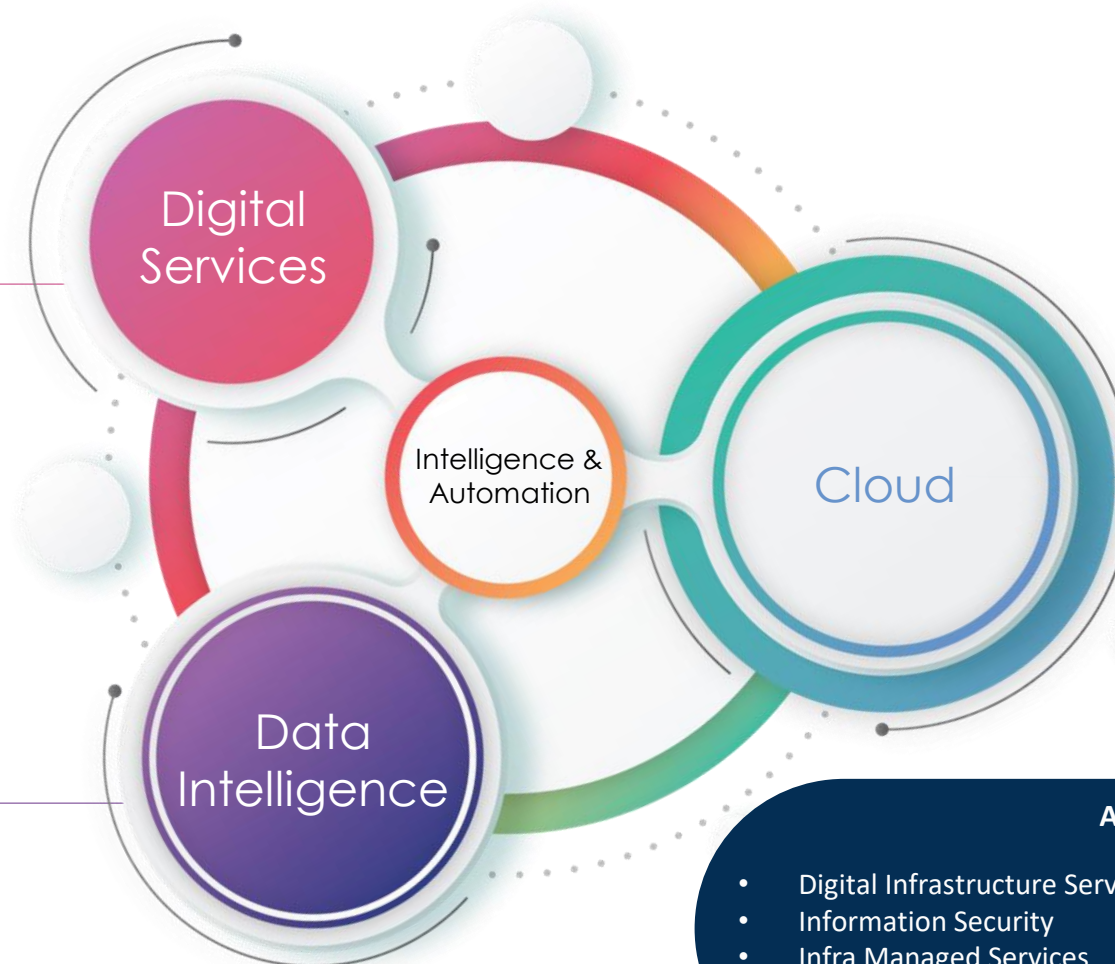


Value Offerings and Accelerators

What We Do

Our global strategy is focused on three key pillars Digital, Data, Cloud and Infrastructure and this directs our work across all our sectors.

- Digital – Automation & Optimization
- Business Applications – ERP / CRM
- Customer Experience
- Application Services & Modernization
- Digital Strategy & Experience
- Integration / Middleware



- Cloud Services
- Workspace Services
- Cloud Ops & Migration
- Cloud App & Integration

- Data Management & Engineering
- BI/Visualization & Analytics
- AI/ML & Data Science

Additional Offerings

- Digital Infrastructure Services
- Information Security
- Infra Managed Services
- App Managed Services
- Outsourcing
- Quality Assurance
- Business Process Outsourcing
- Core and digital banking services

PARTNERSHIPS AND STRATEGIC ALLIANCES

| | | | | | | |
|---|---|--|---|---|---|---|
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  | | | | | |

Trusted By Customers

Insight Driven

We use the power of research, customer outreach and data/analytics to uncover insights that lead to transformational change

Systematically Tested

We validate our solution by testing each system with real users and customers to produce exceptional outcomes

User Centric

We create user experiences that entice and educates customers to optimize their experience

Financially Impactful

We deliver work that has immediate, substantial and sustained impact on your bottom line

| | | | | | | |
|--|--|---|---|--|--|---|
|  اتصالات etisalat |  هيئة الطرق والمواصلات ROADS & TRANSPORT AUTHORITY |  UNITED ARAB EMIRATES PRIME MINISTER OFFICE |  دائرة البلديات والنقل DEPARTMENT OF MUNICIPALITIES AND TRANSPORT |  مصرف الإمارات العربية المتحدة المركزي CENTRAL BANK OF THE U.A.E. |  وزارة الخارجية والتعاون الدولي MINISTRY OF FOREIGN AFFAIRS & INTERNATIONAL COOPERATION |  شرطة دبي DUBAI POLICE |
|  دائرة الصحة DEPARTMENT OF HEALTH |  الهيئة الاتحادية للموارد البشرية الحكومية Federal Authority For Government Human Resources |  الهيئة الاتحادية للهوية والجنسية FEDERAL AUTHORITY FOR IDENTITY & CITIZENSHIP |  دبي الذكية SMART DUBAI |  الإتحاد لالتأمين الصادرات ETIHAD CREDIT INSURANCE |  ورشة حكومة دبي Dubai-Government W/Shop |  الجلس الاتحادي لتركيبة السكان Federal Demographic Council |
|  اينوك enoc |  ادنوك ADNOC |  مصرف أبوظبي الإسلامي ADIB |  بنك دبي الإسلامي Dubai Islamic Bank |  سوق دبي المالي DFM |  حكومة الشارقة Government of Sharjah |  DP WORLD |
|  كارفور Carrefour |  جمعية الشارقة التعاونية SHARJAH CO-OP SOCIETY |  SANIPEX GROUP |  Jumeirah |  Tombosha Bin Mohammed Al-Nahhas المكتب الخاص nhaas office |  JETEX |  Ahmed Mansoor Al-A'ali Group |
|  Johnson Controls |  مركز دبي للتجارة العالمية DUBAI WORLD TRADE CENTRE |  الفيسل ALFAISAL |  SORBONNE UNIVERSITÉ ABU DHABI |  مياه العقبة Aqaba Water |  SUNMARKE SCHOOL Where Amazing Happens™ |  الخدمات العلاجية الخارجية Ambulatory Healthcare Services |
|  مؤسسة زايد العليا لأصحاب الهمم Zayed Higher Organization for People of Determination |  info salons A Freeman Company |  NOR BANK |  U |  Microsoft Services |  بورهيلث purehealth | |

Solution Overview:

Our Customer Data Platform solution offering the fastest way to realise the full potential of customer data, bringing together data from multiple source systems into one centralised repository.

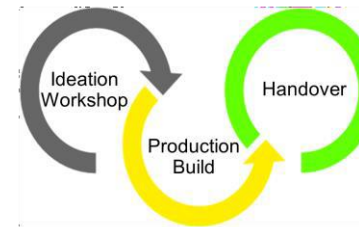
Solution features:

- Tangible outputs based on customer data
- Working Proof-of-value which can be easily extended
- Consolidation of disparate customer centric datasets
- Customer segmentation and Histogram of activities
- An understanding of your market and demographics
- Big data platform with endless scale
- Built on the Azure Data Lake

Benefits:



- Build a Proof-of-Value
- Deploy to a trial environment
- Train you to maintain and extend the solution



- Co-build of the final solution
- Integrate into other solutions and the Power Platform

Implementation*:

As little as 3 weeks and \$10-15k Initial

1-day FTF or virtual training:

Corporate* rate \$1,500

Individual** rate \$500 (\$300 virtual)

What we deliver/USP



Collaboration

- Partnership with Techvista working on a collaborative solution
- Ideation workshops to get started with your first deliverable



Power Platform

- Expertise extending Customer Insights with Power BI, Power Automate, PowerApps & Virtual Agent



AI & Data Platform

- Take Customer Insights to the next level with Machine Learning
- Scale out the solutions with an Azure Modern Data Warehouse



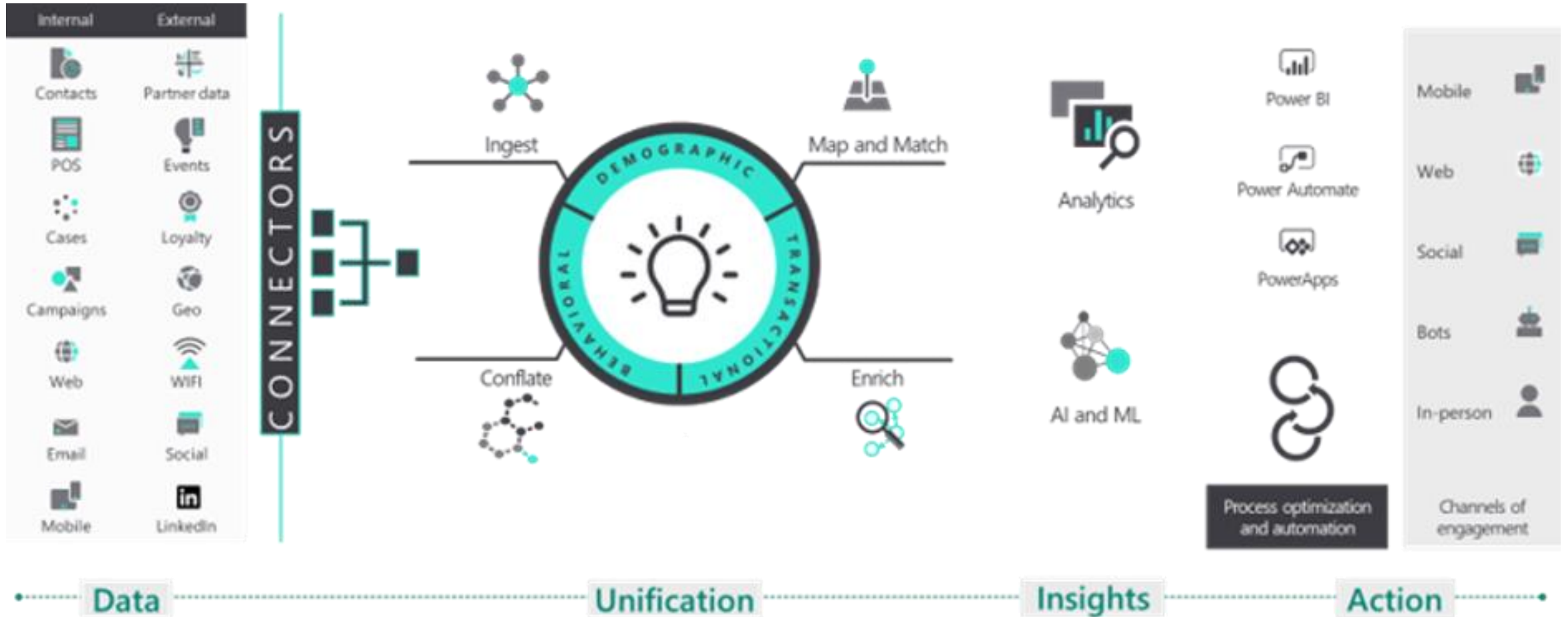
Expertise

- Proven experience with CRM and customer data
- Business Analysts to help uncover key customer drivers

* Maximum 8 attendees

** Minimum 4 individuals required to run the course

Our Approach



Next steps



Watch the demo video

[Learn more](#)



Sign up for free trial

Get started with Dynamic
365 Customer Insight



Thank you

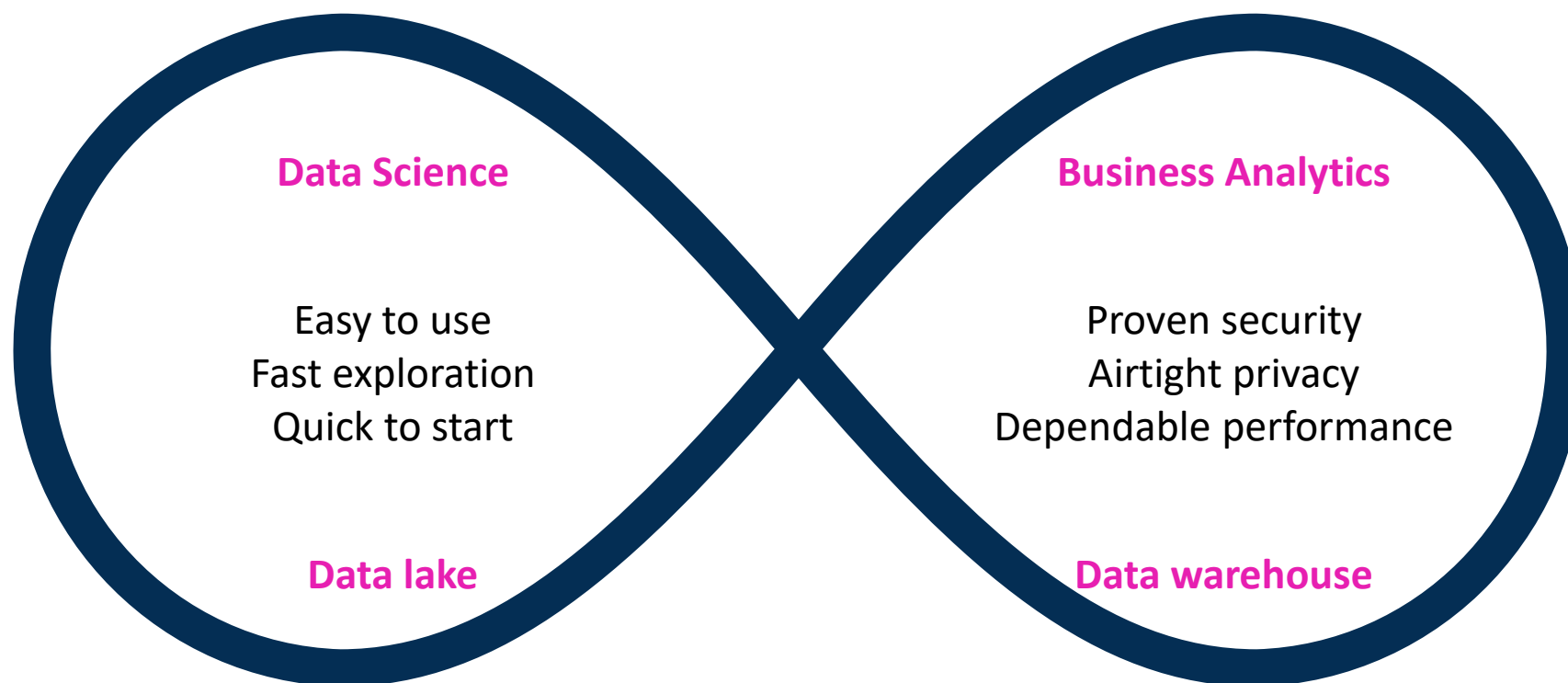


Better together:

Microsoft 365 Customer Insights
& Azure Synapse

Challenge: Maintain two critical, yet independent analytics systems

Solution: Azure brings these two worlds together



Microsoft Customer Experience Platform + Azure Synapse



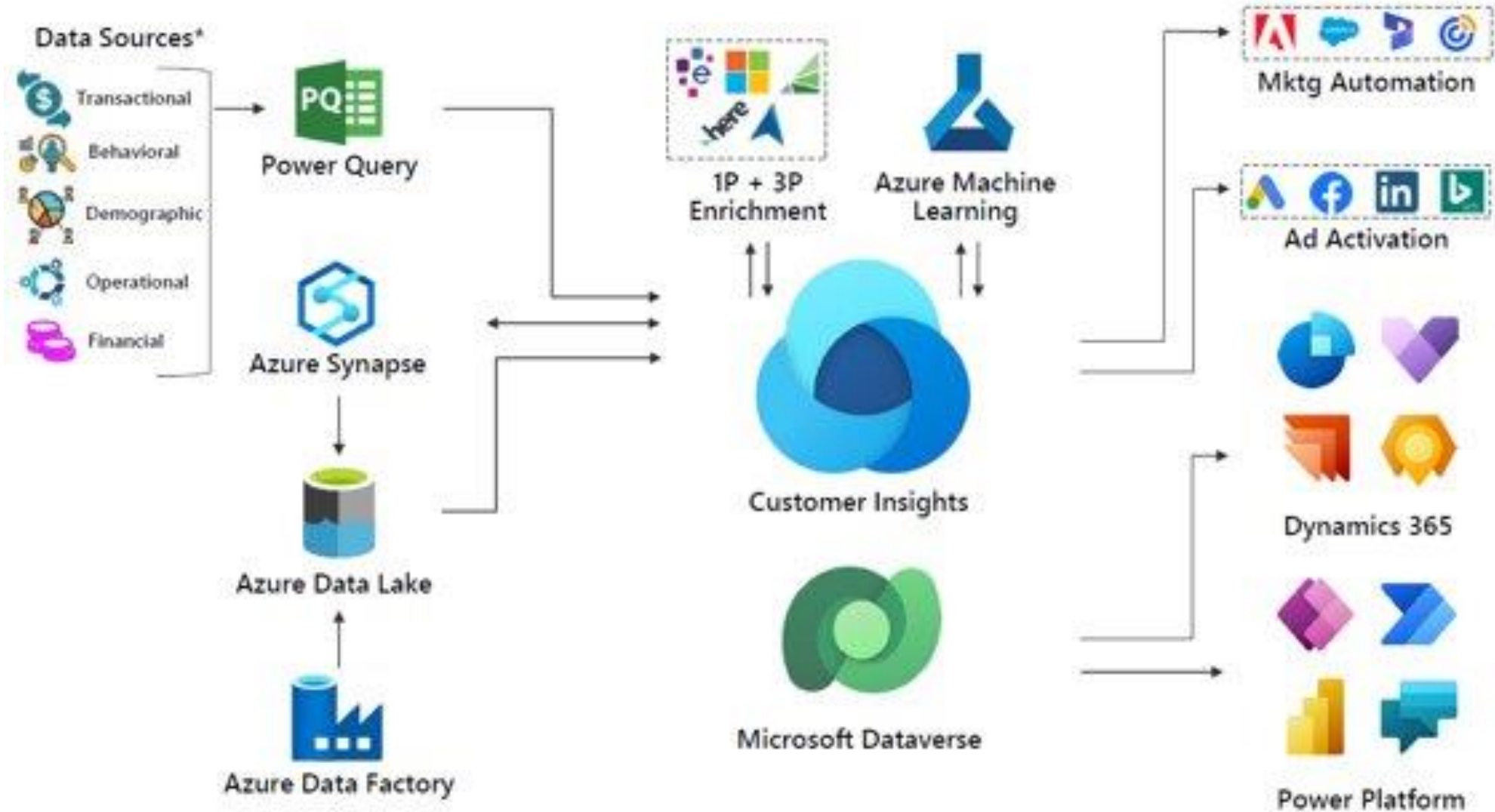
360 view of the customer

+



Advanced analytics

Reference Architecture



Our Capabilities on Azure Data Platform

Extending the power of Dynamics 365 Customer Service to ensure instant connection and engagement with customers across digital marketing mediums.



D365 Integration

Integration of D365 & CE with Enterprise Data Platform using BYOD, Data Lake Sync and Data verse



Ingestion Framework

Techvista has Pre-Built Ingestion Framework with configuration driven mechanism that accelerates the development process



Data Storage

Azure Data Lake used to serve data centric use cases holding data from disparate data sources in refined/transformed format as well in raw format



Data Processing

Apply data transformations with highly scalable and reliable architecture, meeting the business SLA's



Power Platform

Power Platform to build business applications in rapid time, and provides analytical and self serve capabilities using Power BI



Azure Machine Learning

Machine Learning & AI

Solved complex business use cases using Azure Machine Learning & AI, leveraging power of prebuilt AI models