



Data Lighthouse Project

Microsoft Dynamics 365 Customer Insights POC

Data Lighthouse Project - Observations

- Multiple disconnected tools and applications in use holding customer data
- Significant amount of manual, time consuming tasks
- Lack of co-ordination in marketing and events activity
- No single view of customer interactions
- Concerns around compliance with GDPR principles



Data Lighthouse Project – Proof of Concept

The Data Lighthouse Project follows the Data Maturity work that was completed in partnership with Hitachi Solutions last year.

The project focussed on Customer data across a sample of COL Services to understand how it is being stored, managed and used. Supports the case for a Corporate CRM tool.

Proof of Concept to understand the capabilities of Microsoft Dynamics 365 Customer Insights, its ability to meet the needs of COL and support the development of the business case.

Two elements to Customer Insights – ‘Data’ and ‘Journeys’.

Customer Insights – Data

- Customer data brought in from multiple sources, including a live connection to SEEMS
- Data is matched and deduplicated to create unified Customer Records
- Customer Records can be ‘enriched’ by external data sources

City of London Corporation Customer Insights - Data

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

Unify

Use enriched tables View last run Custom

Define matching rules

Define rules to match customer records between two or more tables. Set the order of each table based on priority, and select + Add rule to get started. [Learn about matching rules](#)

Order	Name	Source records	Unique records	Records matched	Include all records
1	Residents : GovernmentSystem	1,000,000	1,000,000		<input checked="" type="checkbox"/>
2	SurveyResidents : SurveySystem	749,865	749,648	80.4% matched	<input checked="" type="checkbox"/>
Name+Email				80.4%	
+ Add rule					
3	RemedyResidents : TicketingSystem	753,237	753,030	80.4% matched	<input checked="" type="checkbox"/>
Name+Email				80.4%	
+ Add rule					

2.5M Unique source records 1.29M Matched and non-matched records 822.6K Matched records only

Back Next Save and close Cancel

City of London Corporation Customer Insights - Data

Home Customers Data Insights Settings

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

Back to Customers Profile add-ons

Lewiss Cremen
Seattle, Washington, United States
Last activity: 02/12/2019, 09:03 (UTC)

Customerid: 000036a2f1c8a5e8e274b83f0f614509

Gender: Male

DOB: 26/05/1999

Phone: 915-630-8021

Emailid: lcremenaks@liveinternet.ru

Address: 616 Melvin Center, Seattle, Washington 98114 United States

Additional fields

SSN: 325-80-4011

Individual: Family

HouseholdIncome: 132,934

RegisteredVoter: No

Customer_Modified...: 29/10/2022, 10:20 (UTC)

Ids

GovernmentSystem: Residents
ResidentID: 3DAC1B9F-470E-4DBE-BC2E-276FC2A882D2
ResidentID_Altern...: 3DAC1B9F-470E-4DBE-BC2E-276FC2A882D2

SurveySystem: SurveyResidents
SurveyContactID: 04E4405F-4DE8-4B8E-852C-4171DE9EED21
SurveyContactID_...: 04E4405F-4DE8-4B8E-852C-4171DE9EED21

TicketingSystem: RemedyResidents

Activity timeline

5 Activity 1 Surveys 1 Tickets

DEC 2019 (1)

Phone Call Activity - 02/12/2019, 09:03 (UTC)
Call related to billing

JUN 2019 (1)

Ticket - 04/06/2019, 15:20 (UTC)
Review ticket submitted

APR 2019 (1)

Phone Call Activity - 15/04/2019, 10:59 (UTC)
Call related to billing

MAR 2019 (1)

Survey - 29/03/2019, 13:47 (UTC)
Survey response received

MAR 2018 (2)

Email Activity - 23/03/2018, 17:26 (UTC)
Email related to billing

Phone Call Activity - 01/03/2018, 21:23 (UTC)
Call in regards to court date

SEP 2017 (1)

Phone Call Activity - 04/09/2017, 12:37 (UTC)
Call in regards to court date

Avg time to resolve incidents
Last updated 2 years ago
2

Avg survey score
Last updated 2 years ago
6

Interest SoV for customers like Lewiss Cremen

Government...	10%
Government...	10%
Community...	65%
State & Loc...	10%
Government...	10%

Brand Sov for customers like Lewiss Cremen

Centers for ...	10%
Amtrak	10%
Small Busin...	10%
United Stat...	55%
Federal Co...	10%

Customer Insights – Data

- A Unified Customer Record shows all interactions across multiple services
- Activities are all provided in a single timeline
- Interests are included on the Customer Record, as well as recommendations for other areas of interest

Customer Insights – Data

- Customer Segments are used to target customer groups
- Segments can be created based on activity or attributes held within their customer record
- Segments can be static or dynamically updated based on certain criteria

The screenshot displays the Microsoft Customer Insights interface. The left sidebar contains navigation options: Home, Customers, Data, Insights, Segments (selected), Measures, Predictions, Custom models, Reports (Preview), and Settings. The main content area is titled 'Segments' and shows 'Activity-based segment suggestions' and 'Attribute-based segment suggestions'. The activity-based suggestions are sorted by 'Recency: High to Low' and include three cards: 'High Recency' (74.4K members, Level: High, Average: 606 days), 'Medium Recency' (90.5K members, Level: Medium, Average: 658 days), and 'Low Recency' (72.7K members, Level: Low, Average: 789 days). The attribute-based suggestions are sorted by 'Percentage: High to Low' and include three cards based on 'ChurnRisk = 7' compared to a 36% baseline: '42% of customers in this suggestion have ChurnRisk = 7' (43.2K members, ClientSurveyScore > 8.38 and ≤ 8.62), '41% of customers in this suggestion have ChurnRisk = 7' (4.7K members, ClientSurveyScore > 8.14 and ≤ 8.38, State is California), and '37% of customers in this suggestion have ChurnRisk = 6' (45.5K members, ClientSurveyScore > 8.86). Each card includes a 'See suggestion' link and a 'Create segment' button.

Customer Insights – Journeys

- Branded e-mail templates can be configured to ensure consistent look and feel
- All e-mails can be previewed and tested
- Accessibility checking built into the Customer Insights
- Spam score also available

The screenshot displays the Microsoft Dynamics 365 Customer Insights Journeys interface. The main window shows a preview of an email template titled "Pride Business Appreciation Event Invite". The email content includes a logo for "CITY OF LONDON", a photograph of a vineyard at sunset, and a "REGISTER NOW" button. The interface also features a left-hand navigation menu with categories like Engagement, Audience, Lead Management, and Channels. On the right, there is an "Email analytics" panel showing data for "All journeys (1)".

Inflow	Processing	Processed
6	0	6

Overview		
Delivery rate	Open rate	Click rate
100%	50%	50%

Delivery funnel	
Email sent	6
Email delivered	6
Unique opens	3
Unique clicks	3

Delivery issues	
There's no available data	

The screenshot displays the Microsoft Dynamics 365 Customer Insights Journeys interface. The main workspace shows a form design for 'THE GLOBAL CITY' with the following fields:

- Email Address ***: Enter your email address
- First Name ***: Enter your first name
- Last Name ***: Enter your last name
- Company Name**: Company Name
- Where did you hear about us? ***

Form analytics on the right side show:

- Form analytics**: 50% Conversion rate, 3 Submissions, 6 Views
- Submission funnel**:

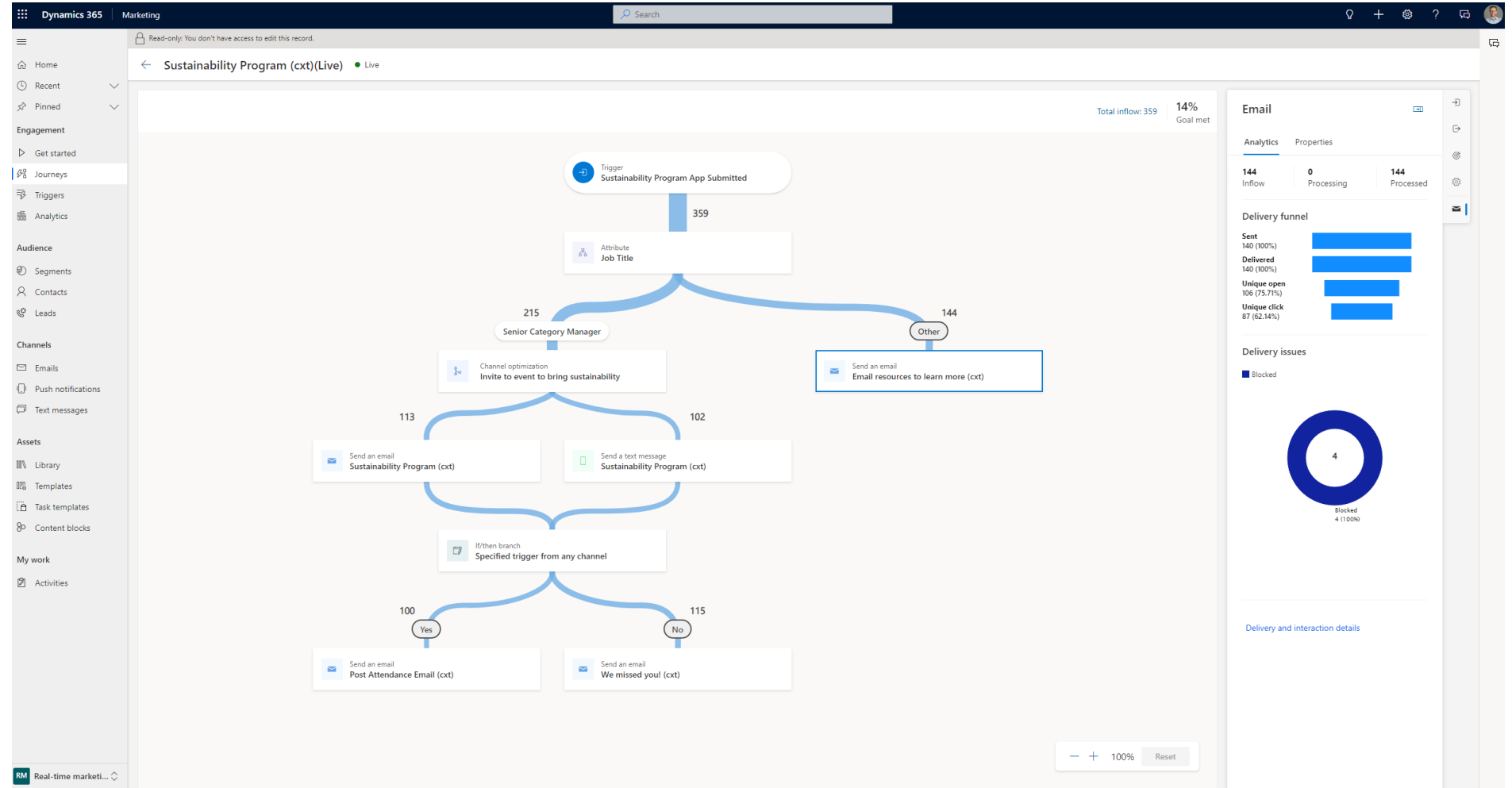
Form views	4 (100%)
Submissions	3 (75%)
Unique submission	3 (75%)

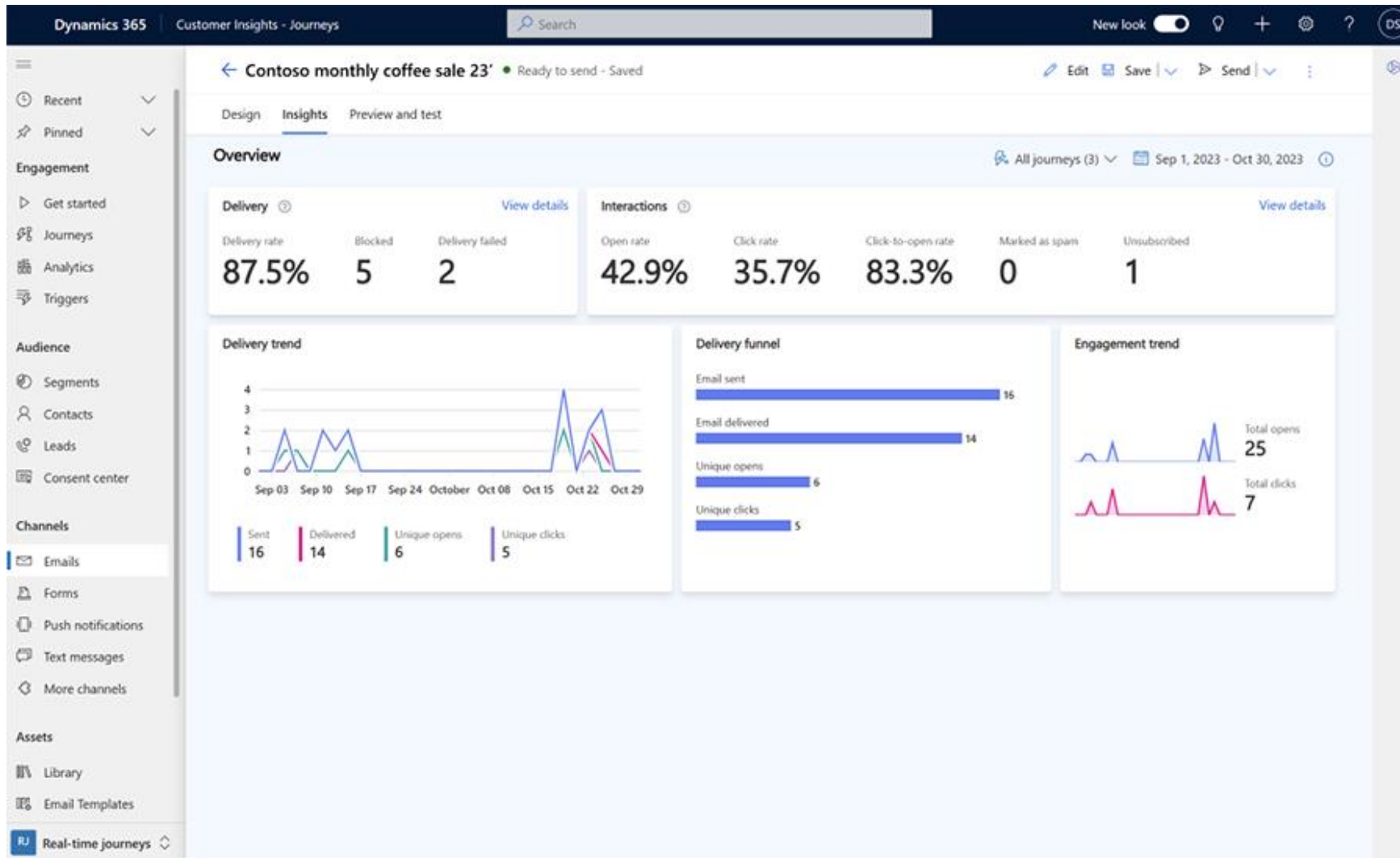
Customer Insights – Journeys

- Forms are available for customers to sign up for marketing or events
- Branding is fully configurable, with different templates available based on the area of interaction

Customer Insights – Journeys

- ‘Journeys’ can be configured based on certain criteria or customer behaviour
- e.g. if a customer registers for an event, then joining instructions can be automatically sent. If a customer fails to register for an event then they receive a reminder instead.
- Messaging can also be tailored based on responses





Customer Insights – Journeys

- Detailed analysis is available for every e-mail or form sent including delivery rate, open rate and click rate

Customer Insights – Journeys

- Detailed insights are also available on a Customer's Record
- Emails received, opened
- Forms completed
- Events attended

The screenshot displays the Microsoft Dynamics 365 Marketing interface for a customer record. The top navigation bar includes 'Dynamics 365 | Marketing', a search bar, and various utility icons. The left sidebar contains navigation options: Recent, Pinned, Engagement (Get started, Journeys, Analytics, Triggers), Audience (Segments, Consent center), Contacts (selected), Leads, Channels (Emails, Forms, Push notifications, Text messages, More channels), and Assets (Library). The main content area shows the contact 'Jeannette Nielsen' with tabs for Summary, Details, Insights (selected), Event attended, Files, and Related. Below the tabs are options for 'Real-time marketing' and 'Outbound marketing'. The 'Overview' section for 'Real-time marketing' (Jan 22 2022 - Feb 22 2022) features several data cards:

- Channel engagement:** A bar chart showing engagement metrics: Emails opened (25), Emails clicked (20), Forms visited (12), Forms submitted (4), Text link clicked (14), Text message replied (8), Push notifications opened (9), Push notifications link clicked (5), and Custom channel clicked (5).
- Email:** Total opens: 25, Open rate: 46%, Delivery issues: 7. Includes a link to 'View email insights'.
- Form:** Submissions: 4. Includes a link to 'View form insights'.
- Text message:** Total clicks: 14, Delivery issues: 7. Includes a link to 'View text message insights'.
- Push notification:** Opens: 9, Open rate: 56%, Not sent: 8. Includes a link to 'View push notification insights'.
- Custom channels:** Total clicks: 5, Delivery issues: 2. Includes a link to 'View custom channel insights'.

Customer Insights – Journeys

- Event Management function to support event marketing and registrations
- Events can be in person or virtual using Teams
- Check in App also available
- Additional functionality includes agendas, speaker biogs, session planning with all event info hosted on the platform

The screenshot displays the Microsoft Dynamics 365 Customer Insights Journeys interface for an event named "Sailesh - Pride Event". The interface is divided into several sections:

- Header:** Shows "Dynamics 365 | Customer Insights - Journeys" and a search bar. The event name "Sailesh - Pride Event - Saved" is prominently displayed, along with the active status and owner information (Click Dimensions, Live Publish status).
- Navigation:** A horizontal bar shows the event's progress through stages: "EventMainBusinessProce..." (Active for 7 days), "Preliminaries (7 D)", "Agenda", "Organize", "Promote", "Launch", and "Post Event".
- General Tab:** The "General" tab is selected, showing key information and schedule details.
 - Key information:** Event name (Sailesh - Pride Event), Event type (Executive briefing), Registration count (1), Check-in count (1), and Event URL (https://assets-gbr.mkt.dynamics.com/fab...).
 - Schedule:** Event time zone ((GMT+00:00) Dublin, Edinburgh, Lisbon, London), Event start date (10/07/2024, 09:31), Event end date (10/07/2024, 11:31), and Countdown in days (0).
- Stream this event online:** A section with a toggle switch for "Do you want to stream this event?" (currently set to "No"). A notification states: "Microsoft Teams is available as a streaming channel. Choose Meeting for a two-way group experience or Teams Webinars for webinars with enhanced audience participation controls. Toggle to 'Yes' to enable streaming now".
- Location:** Fields for Building (Guildhall), Room (Great Hall), and Layout (Round Tables).
- Venue constraints:** A field for Maximum event capacity (628).

- Left Sidebar:** A navigation menu with categories: Event (Recent, Pinned, Events, Event Registrations, Event Team Members), Participants (Speakers, Check-ins), Venue management (Buildings, Rooms, Layouts), Logistics (Event Vendors, Hotels, Hotel Room Allocati..., Hotel Room Reservat...), and Sponsorship management (Sponsorships, Sponsorable Articles). The "Event planning" icon is highlighted at the bottom.

Conclusion

Single view of the Customer

Shared customer data across multiple services

Oversight of all digital marketing activity and events

Approved branding and templates

Analysis of engagement levels and impact

