Microsoft Dynamics 365

Delight Your Customer in Just Three Steps

This information is for you if…

- You've ever had a customer say, "Why don't you know that about me?"

- You're not sure what your customer experience is from one part of the business to another.

- Your company is missing opportunities to engage with your customers.

- You have a customer-centric strategy but need a clear way to execute it.

Estimated reading time: <9 minutes

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Personalization: essential, but difficult to get right
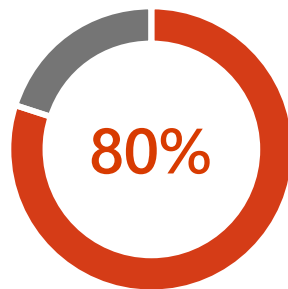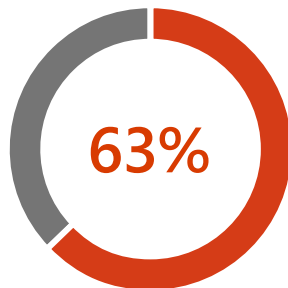
80% of frequent shoppers only shop with brands that personalize the experience.[1]

63% of consumers will stop buying from brands who use poor personalization tactics.[1]

Personalization has become an essential way to stand out with customers and stay ahead of the competition. It's the ultimate expression of customer centricity. This is true whether your organization is direct-to-consumer, business-to-business, a small or medium-sized business, or a large enterprise.

[1] "Privacy & Personalization," SmarterHQ, undated.

However, creating personalized customer experiences means walking a fine line between being helpful and delightful and being overbearing, inauthentic, or even creepy. While a highly relevant customer experience is essential, failure to personalize thoughtfully will negatively impact customer conversion and retention. Implementing a strategy that crosses all areas of business is a powerful way to demonstrate a holistic relationship with your customer.

A holistic relationship with your customer allows you to personalize interactions in an authentic way that strengthens loyalty. With a 360-degree view of the customer, it's easier to deliver helpful and delightful experiences in every interaction they have with your brand.

This guide walks through three steps for creating a truly customer-centric strategy.

- We start with the importance of seeing the customer in every part of the business—the silos of sales, marketing, and service are no longer sustainable.

- Then we explore how to build consistency in every customer touchpoint.

- The third step is to take the pulse of customer sentiment through surveys and other tools to learn more about their perspective and gain better insights.

- Finally, integrate this feedback with other data you've already collected on each customer to deliver the personalization they expect.
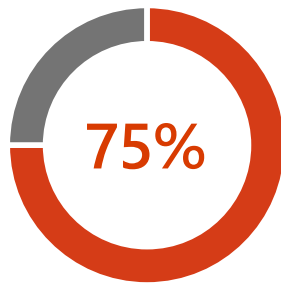
Let's get started.

1

See the customer in every part of the business

Your customer believes you should know everything about them:

75% of customers expect [customer service agents] to know who they are and their purchase history.[2]

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Do this:

Unify all customer data for a complete picture

While the typical customer relationship management (CRM) platform can help surface some customer data, they typically only deliver limited, specific details, such as a customer's name, address, or basic purchase history. To add or process additional types of data, you need to integrate sources across multiple departments (sales, marketing, field service, and shipping, for example) and multiple data sources including third-party applications.

[2] Microsoft, Global State of Customer Service, 2020.

Bringing together these fragmented data sources isn't easy. While you can likely convince your colleagues to share their valuable data, it's less likely that those data sources can talk to each other. They're not built to integrate, and this fragmented landscape leaves many organizations stranded halfway to their ideal customer experience. But there is a solution.

If I contact product support and they don't already know exactly when I bought my dishwasher and that this is the second time I've contacted them, and that a field tech visited a week ago, that's going to be frustrating for me."
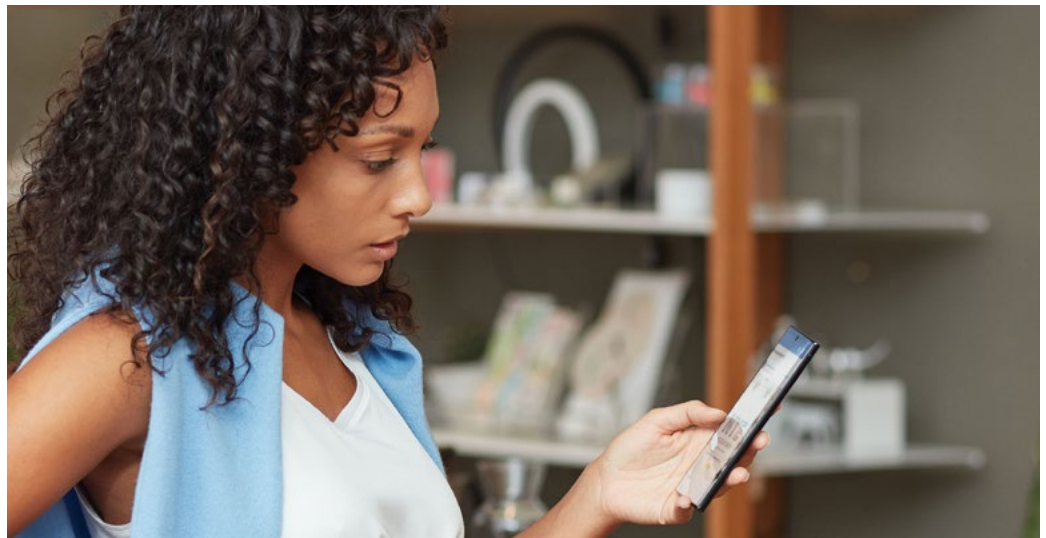
Customer data platforms unify data sources

A customer data platform (CDP) is software that creates a persistent, consistent customer database that is accessible to other systems. A CDP works with your existing data sources, pulling data together in one place to provide a comprehensive view. For example, the data below (and more) for a single customer can be seen in one view with a CDP:

- Email marketing analytics

- Website analytics

- Social media engagement

- Sales records

- Service records

- Shipping data

When you're able to see your customer across all parts of the business, some very important things happen. First, you find new opportunities to engage. Second, you gain confidence about what matters to your customer, and how to address it. Third, your customer feels seen and understood and immediately more loyal to your organization.

Customer story:

Campari Group

Campari Group[3], with 60 beverage brands, understands that a key to brand success is driving personalized engagement with its consumers and with the bartenders who pour the drinks and serve as brand ambassadors. To do this, they need to make effective use of data across marketing, sales, and customer service and develop a 360-degree customer view.

Campari chose Microsoft Dynamics 365 Customer Insights and Dynamics 365 Marketing for several reasons, including compliance with the European Union's General Data Protection Regulation.

Goal:

Develop a comprehensive, cross-functional customer data platform that could be used across the organization and its agencies to better target customer engagement activities.

Outcome:

- In just two weeks, connected all of the data points in Customer Insights and deployed first email marketing automation campaign with Dynamics 365 Marketing

- During COVID-19 disruption, grew bartender attendance at virtual trainings from a few dozen per week to 500 participants, four times a week

[3] Campari Group customer story, Microsoft.

Forrester Research on Dynamics 365 Customer Insights

Forrester Research positions Microsoft Dynamics 365 Customer Insights as a leader in the category of Customer Analytics Technologies.[4] The ranking comes with top marks for customer data management, usability, and governance. According to Forrester, "It's also worth noting that out of all the vendors in this evaluation, Microsoft received the highest Net Promoter Score from client references."
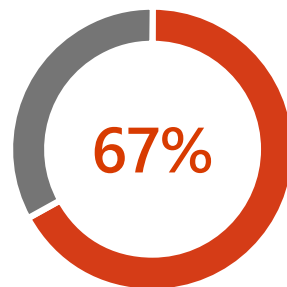
Read the report >

[4] The Forrester Wave™: Customer Analytics Technologies, Q3 2020.

2

Be proactive across customer touchpoints

Your customer wants a proactive experience:

67% of consumers say it's important for brands to automatically adjust their content based on their current context for a real-time personalized experience.[5]

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Do this:

Be proactive with a CDP

As a single source of truth that delivers a 360-degree view of customers, a CDP helps determine the best action possible for each individual customer in any context or stage of the journey—whether acquisition, conversion, or retention. Simply put, it identifies the right engagement, for the right individual, at precisely the right time.

[5] 2018 Adobe Consumer Content Survey.

Using historical customer data and machine learning models, businesses can get insights that empower employees across all lines of business to deliver the best message or service for every customer scenario—from personalized marketing ads based on customer search histories, to next-best-offer sales suggestions based on past purchases or interests, and proactive customer service support using predictive analytics and anomaly detection. Prebuilt AI helps identify the highest value customers and which products to recommend to them.

A CDP helps build cross-department cohesion in every engagement a customer has with the organization. With access to a single holistic customer profile, a sales associate could seamlessly take over a case from a service rep to assist a customer with a product add-on that resolves a problem with a previous purchase. A cohesive customer experience not only improves customer satisfaction and drives retention but can result in significant top-line gains.

Even though it was my first time buying from them, it seemed like they already knew me because the ads I saw and the promotion in the email were for the exact exercise equipment I was considering buying."

Customer story:

**MVP
Health Care**

MVP Healthcare[6] deployed Dynamics 365 Customer Insights with Dynamics 365 Customer Service to personalize its member engagements by unifying data from multiple sources for a single view of every member. Then Dynamics 365 Sales and Dynamics 365 Marketing were added to build a single, fully interoperable member-engagement platform, connected by Common Data Service. With Dynamics 365 Marketing, the team can target campaigns and informational content to specific members or groups who may need help managing diabetes, sleep apnea, acid reflux, or other chronic conditions.

Goal:

Minimize high-level claim types such as heart attack, stroke, and diabetes by monitoring and managing with suggested activities.

Outcome:

• $6 million in savings per year

• More member value

• Healthier communities

[6] MVP Health Care customer story, Microsoft.

Effortlessly connect data from every customer interaction

Unlike other CDPs, Microsoft Dynamics 365 Customer Insights is a self-service solution that enables faster time to value with zero to minimal consulting engagement. As part of a unified data estate, Customer Insights uses analytics, artificial intelligence, and machine learning to create 360-degree customer profiles with actionable insights. When combined with Dynamics 365 Marketing, Customer Insights continuously updates information about target segments and lead scores based on information from multiple data sources.

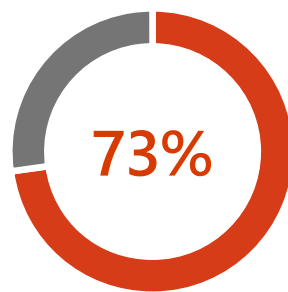**Sign up for a free trial of Dynamics 365 Customer Insights >**

Sign up for a free trial of Dynamics 365 Marketing >

3

Turn customer feedback into insights

Your customer wants to be heard:

73% of consumers say a business has never communicated with them online in a way that felt too personalized or invasive.[7]

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Do this:

Use customer feedback as a guidepost

It's one thing to have visibility of your customer throughout the business and to show up consistently across all touchpoints. It's quite another to get direct feedback from customers, and then to respond appropriately. Now imagine this feedback and response happening in real time. For example, let's say a customer has just received their product. Send them a two-question survey to evaluate their satisfaction with the delivery. Then a few days later, send them a more in-depth survey to evaluate their satisfaction with the product.

[7] Accenture, "Making it Personal," Pulse Check, 2018.

In terms of customer-centricity, there is nothing like customer feedback to help guide responsiveness. Feedback can even help direct business and marketing decisions, from product experience to website interactions and customer support scripting. The feedback you seek can cover customer experiences with your company in general, the product, and the services you provide.

While soliciting customer feedback can feel overwhelming without the proper tools, a number of vendors have introduced user-friendly survey platforms for this use. Integrating this feedback data with your CDP is critical to gaining a holistic view of your customer in the drive toward true customer centricity.

If I have a relationship with a business and they ask me what I think about something, I'm happy to tell them. How else are they going to know how to respond to whatever's going on?"

Customer story:

UNICEF Netherlands

Private donors and volunteers are increasingly hard to find and retain. Many not-for-profits compete for the time and resources of these individuals, and the expectations of these supporters have risen—as seen in feedback collected from private donors and volunteers. UNICEF Netherlands[8] needed a customer data platform to quickly and easily combine data from multiple sources, analyze the data, and activate via marketing and communication channels. They chose Microsoft Dynamics 365 Customer Insights as its CDP solution for its fully connected platform.

Goal:

Personally engage supporters and potential supporters to increase their overall commitment to the organization.

Outcome:

- Faster insights about donors, to turn into action

- Segmentation helps focus and engage individuals in a very relevant way to retain them

[8] UNICEF Netherlands customer story, Microsoft.

Integrate Customer Voice with Customer Insights

Create surveys with just a few clicks and easily personalize them at scale. Ready-to-use templates are easy to customize so you can capture feedback instantly. Connect feedback with workflows across your Dynamics 365 applications for intelligent customer engagement decision-making and to coordinate responses. Powered by artificial intelligence for detection, sentiment analysis, and comment categorization, you can easily set alerts on satisfaction metrics to be notified in your dashboard when you receive below satisfactory scores.

Get started with Dynamics 365 Customer Voice for free >

Get started

We've outlined three simple steps on the path to complete customer centricity. With the right tools you can build the kind of relationship that brings loyalty, increased lifetime value, and important guidance on business and product development.

Connect your entire stack

Customer Insights is a powerful customer data platform that brings together your disparate data sources for an ultimate 360-view of your customers. Analyze customer interactions across websites, mobile apps, and connected products to truly understand customer preferences and intent. To get the most out of Customer Insights, pair with Dynamics 365 Customer Voice to incorporate customer sentiment and survey feedback. Activate real-time insights on destinations including analytics, email marketing, advertising, and customer engagement platforms including Dynamics 365 Marketing, Dynamics 365 Sales, and Dynamics 365 Service—or any of the Dynamics 365 suite of services. You can also activate the insights across third party platforms for advertising, customer engagement, and data visualization.

Start delighting your customers today.

Let's connect

Microsoft Dynamics 365