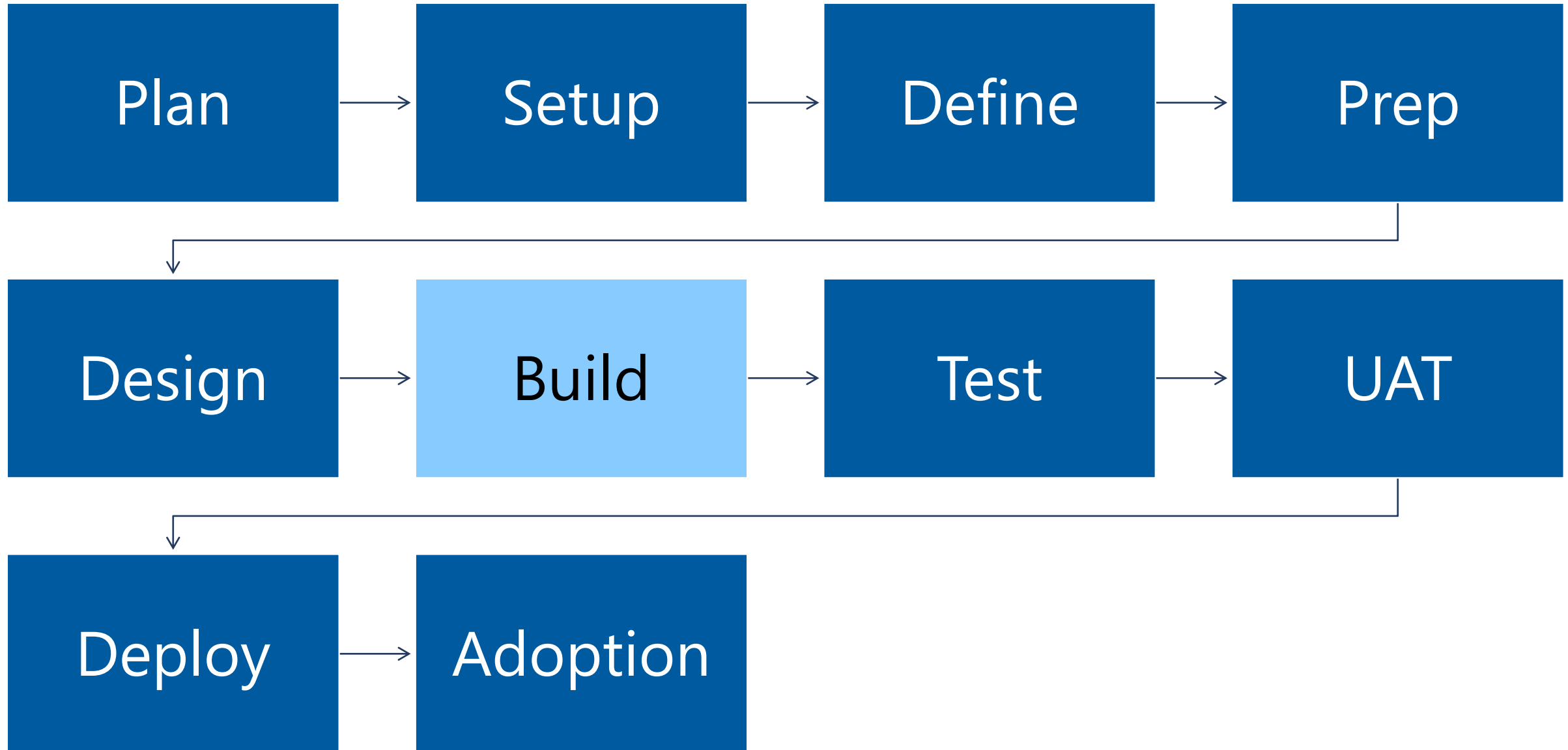


Module 03

Build the Solution Segments, Customer Cards, Activities, Enrichment

Consistent Solution Patterns



Build – with Design and Test, an iterative process

Data

- Ingestion (Subset)
- Define entities
- Define relationships

Unified profile

- Configure map/match/merge rules
- (Optional) Apply self-conflation
- Execute M3

Activities, measures/KPIs, Segments, Outbound

- Configure activities
- Configure measures/KPIs
- Configure segments
- Configure export destinations
- Execute activities and measures/KPIs
- Execute segment creation and export

Module 3 Agenda

3.1 Segments

3.2 Customers Page

3.3 Activities

3.4 Data Enrichment

Lab 3



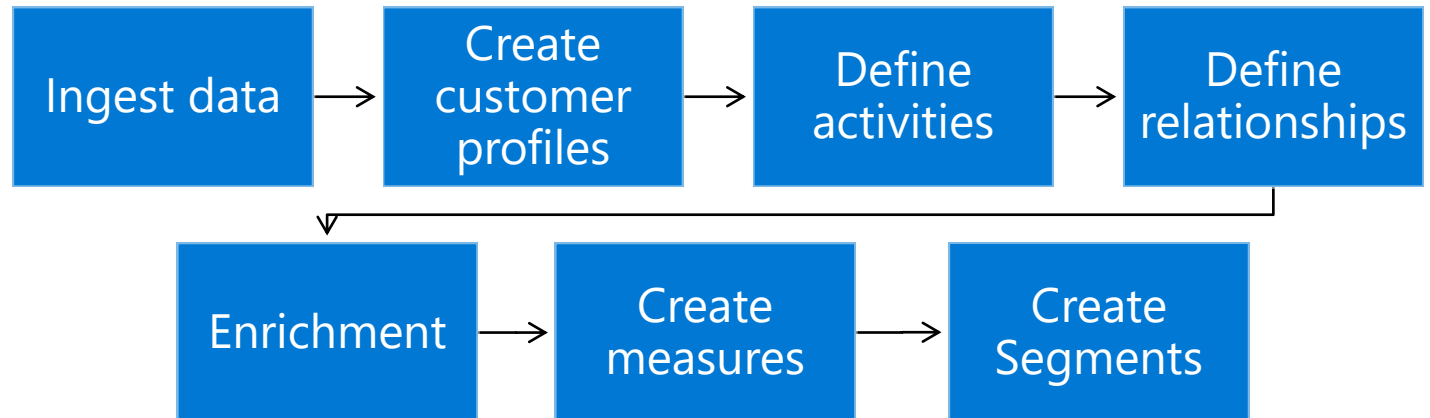
Review – Terms and Processes

Data source – a container for one or more datasets

Dataset – a logical table of data

Entities – created by loading a dataset; a dataset

Customers Page – a consolidated view of your customers



3.1 Creating Segments

Segments group your customers based on demographic, transactional, or behavioral attributes.

You can use segments to target promotional campaigns, sales activities, and customer support actions to achieve your business goals

Segments defined by filters around the Customer Profile entity and its related entities. Each segment, after processing, creates a set of customer records that you can export and take action on.

Segments

Segments		Insights (preview)
Segments		
Name	Type	
High-Churn Risk Hotel Customers	Dynamic	
High Value Online Customers	Dynamic	
Customers From Washington	Dynamic	
Summer Promo	Dynamic	
Customers from California	Dynamic	
SummerPromotionExpansion	Expansion	

Types of Segments

Static

Segments that are processed only once – either after the creation or update of any of its filters.

Use static segments when properties are not expected to change over time or when they are expected to be used only once. For example, customers who attended a specific event.

Dynamic

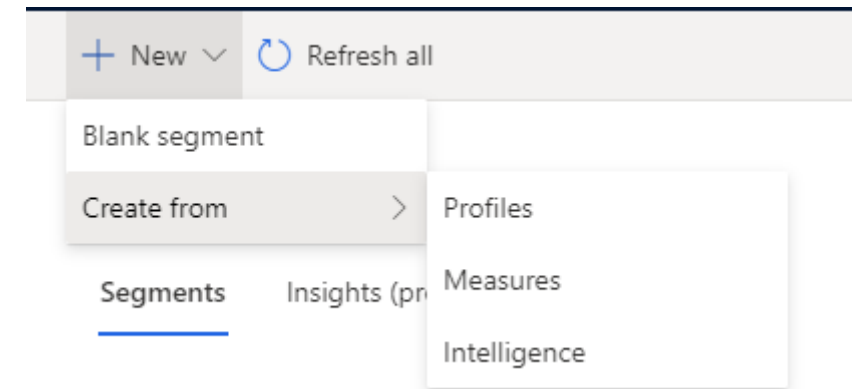
Segments that are processed according to a recurring schedule.

Use dynamic segments when customers' attributes change over time. For example, customers who have bought products worth more than \$500 in the last three months.

Creating a Segment

Create a blank segment definition, or a “quick” segment:

from the Customer entity,
from a Customer Attribute type of
measure,
or from a predictive model



Group 1: Filter defined using Customer_Measure : CustomerInsights entity ⓘ

Customer_Measure : CustomerInsights	Average Store Purcha...	greater than equ...	113
And	Customer : CustomerInsi...	DateOfBirth	greater than equ... 01/01/1981
And	Customer : CustomerInsi...	DateOfBirth	less than equal to 12/31/1996
And	Customer : CustomerInsi...	All records	

Creating a blank segment definition

Select dynamic or static

Define a group (customer set)

Select entity, attribute, operator, value

If selected entity is connected to the unified Customer entity via relationship, add entities until you can select Customer:CustomerInsights entity in UI, then choose All Records in each condition

New segment



Type



Dynamic

Create a group of customers that updates every 12 hours.



Static

Create a group of customers that doesn't change.

Advanced



Create the segment by using SQL

Group 1: Filter defined using Customer : CustomerInsights entity ⓘ



Customer : CustomerInsights



RewardPoints



greater than equ...



1000



+ And

+ Or

Managing Segments

Manage refresh

Activate/Deactivate

Export segments

Exporting Segments

Export as CSV

Export to Dynamics 365 Marketing (Segments)

Export to Dynamics 365 Sales (Marketing Lists)



Export to 3rd parties (eg Facebook Ad campaigns)

Export destinations (preview)

Export unified customer data across a variety of business apps and tools.

Discover My export destinations

+ Add destination ↗ Export all

	Display name	Type	Created
	MarketingSegments	Dynamics 365 Marketing (Segments)	3 days ago

Segment Insights

New feature which allows you to compare members of multiple segments
Find out what differentiates two segments or what they have in common.

Available analysis types:

Segment overlap – which customers appear in multiple segments?
ex. Frequent buyers and highest satisfaction

Segment differentiators - which profile attributes and measures distinguish the selected segment?

HighValueOnlineVSCustomersFromCalifornia

Attributes		Measures			
Rank	Attribute	Difference score		HighValueOnlineCustomers (%)	CustomersFromCalifornia (%)
1	RewardPoints	0.0034		255.65-270.1 (6.00%)	255.65-270.1 (6.88%)

Segment Overlap Analysis

Segment overlap – which customers appear in multiple segments?

Segment Overlap

Choose 2–3 segments to visualize shared customers between your segments.

Search

☐

High-Churn Risk Hotel Customers
3420 members 11.64% of all customers

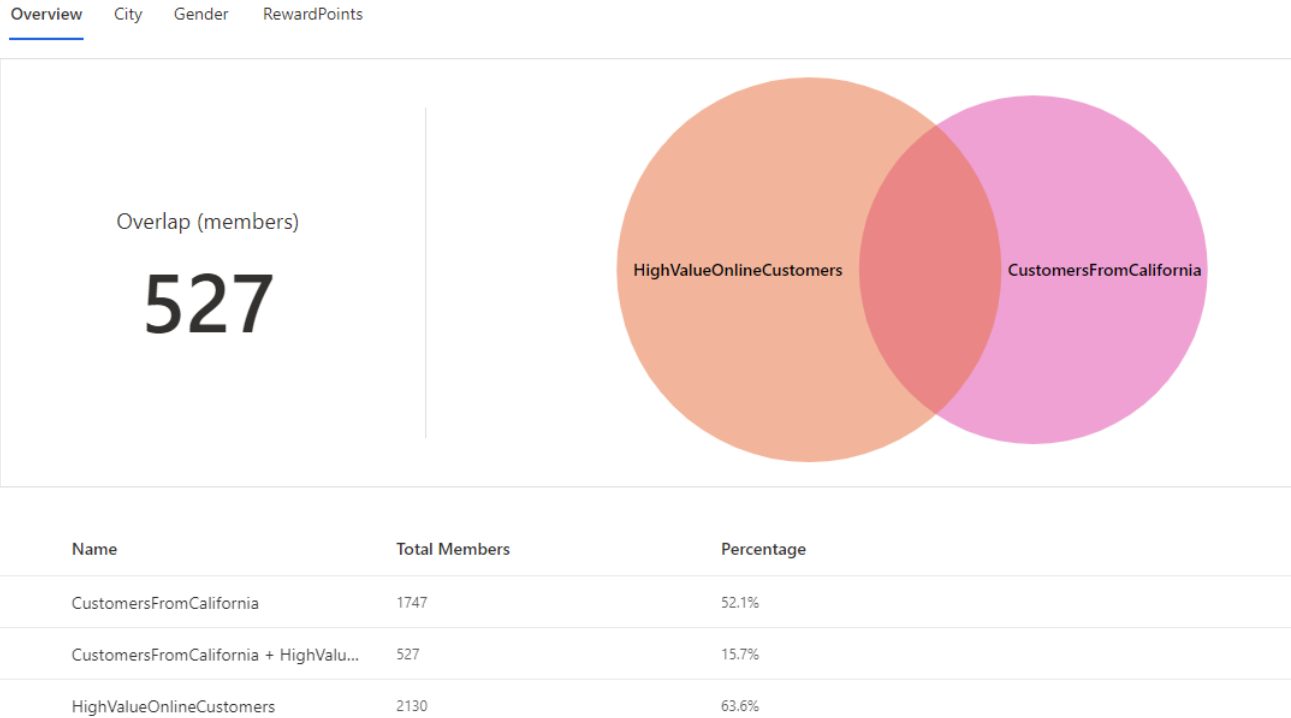
☒

High Value Online Customers
2130 members 7.25% of all customers

☐

Customers From Washington
293 members 1.00% of all customers☐☒

HighValueOnlineOverlappedwithCaliforniaCustomers



Segment Differentiators

Segment differentiators:
which profile attributes and
measures distinguish the
selected segment?

Choose primary segment

Choose a segment

Search

- ☐ High-Churn Risk Hotel Customers
3420 members 11.64% of all customers
- ☒ High Value Online Customers
2130 members 7.25% of all customers
- ☐ Customers From Washington
293 members 1.00% of all customers
- ☐ Summer Promo
770 members 2.62% of all customers
- ☐ Customers from California
1747 members 5.95% of all customers

Choose another segment

This segment will be compared with the previous one.

Search

- ☐ High-Churn Risk Hotel Customers
3420 members 11.64% of all customers
- ☐ Customers From Washington
293 members 1.00% of all customers
- ☐ Summer Promo
770 members 2.62% of all customers
- ☒ Customers from California
1747 members 5.95% of all customers

Choose attributes

See the differences between specific measures and attributes from your chosen segments. Choose at least 1 attribute.

Search

Customer fields

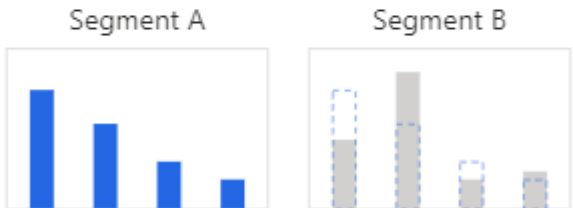
Measure fields

- ☐ AverageStorePurchase
- ☐ AverageWebPurchase
- ☒ LifetimeSpend
- ☐ TotalClubPoints
- ☐ TotalOnlineSpend

HighValueOnlineVSCustomersFromCalifornia

Attributes		Measures		
Rank	Attribute	Difference score	HighValueOnlineCustomers (%)	CustomersFromCalifornia (%)
1	RewardPoints	0.0034	255.65-270.1 (6.00%)	255.65-270.1 (6.88%)

The difference score describes the degree of difference between two segments' attributes. The higher the score, the more different they are.



Segment Expansion

Using Artificial Intelligence, similar customers to an existing segment can be found.

The fields you select will define on what basis the system will try to find similar customers to the source segment.

Segments

All segments Insights (preview)

Name	Type	State	Status	Members	Last refreshed
Customers From Washington	Dynamic	Active	Successful	261	a month ago
Customers with Loyalty card	Dynamic	Active	Successful	5041	a month ago
Customers with reviews	Dynamic	Active	Successful	10000	a month ago
Highly Engaging C...	Dynamic	Active	Successful	3309	a month ago
High-Value Customers		Active	Successful	3396	a month ago

View
Download
Edit
Refresh
Deactivate
Find similar customers
Add to
Delete

- Similarity scores

- > below 0.55 *not similar* to customers in the source segment
- > between 0.55 – 0.7 are classified as *somewhat similar*
- > between 0.7 – 0.85 are classified as *similar*
- > between 0.85 – 1 are classified as *very similar*

Expand segment (preview)

Use an AI model to create a new segment of customers with attributes similar to those in your source segment.

Name your new segment

HighlyEngagingCustomersExpansion

Select fields to find similarities across customers [Add fields](#)

Source segment: Highly Engaging Customers 3,309 members

Choose who to consider in your new segment

☒ All customers except source segment ☐ Only customers in a different segment

Choose the maximum number of customers you would like in your expanded segment

For a higher average similarity score, choose a lower number of customers. If you want a higher number of customers, the AI model will include customers that are less similar. [Understanding the AI model](#)

6352 out of 31760 customers

20% of customers from all customers will be in the new segment.

☐ Include members from source segment in addition to customers with similar attributes.

3.2 Customer Cards

View customer information

Customer Insights

Audience insights

Primary target audience
Individual consumers

Home

Customers

Segments

Measures

Intelligence

Data

Data sources


Entities

Unify

30 days left in trial | For licensing options, contact sales.

Search & filter indexClear filtersShow filtersExpand cardsSort by

5.1K customers



Payor Edward

Columbia, South Carolina
USA

CustomerId

bbf6842b0087862bce6935c944a8ba05

Telephone

107.904.1808x211

Email


edward_payor@lopezgroup.com

StreetAddress

442 Odonnell Ford Suite 030

PostCode

73426



Nancy Secrest

Hialeah, Florida
USA

CustomerId

662ab86503e727573a1ab57ea980b302

Telephone

586.910.0533x617

Email


nancy_secrist@collinsllc.com

StreetAddress

9883 Pamela Trail Suite 254

PostCode

67123



Donna Chainey

Jacksonville, Florida
USA

CustomerId

9cf44f446c74ecd16e41eb216eea964c

Telephone

798-761-2277x5925

Email

donna_chainey@wardbryan.com

StreetAddress

674 Davis Rapids Apt. 869

PostCode

18531

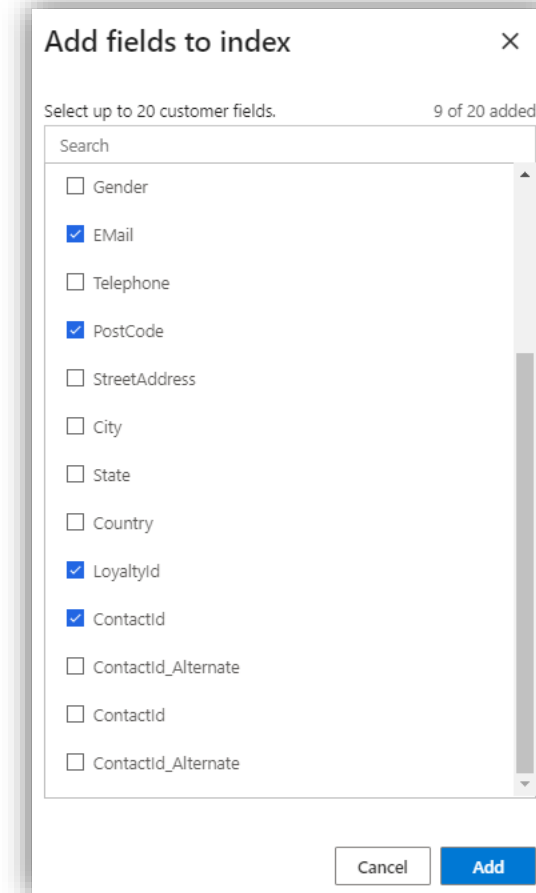
© 2022 Microsoft. All rights reserved.

Customer Cards

Configure Search

Columns to index and search

Filtering



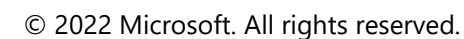
The screenshot shows a dialog box titled "Add fields to index" with a close button (X) in the top right corner. Below the title bar, it says "Select up to 20 customer fields." and "9 of 20 added". There is a search bar labeled "Search". Below the search bar is a list of customer fields with checkboxes next to them. The fields are: Gender, EMail, Telephone, PostCode, StreetAddress, City, State, Country, LoyaltyId, ContactId, ContactId_Alternate, ContactId, and ContactId_Alternate. The checkboxes for EMail, PostCode, LoyaltyId, and ContactId are checked. At the bottom right of the dialog box are two buttons: "Cancel" and "Add".

Field Name	Selected
Gender	<input type="checkbox"/>
EMail	<input checked="" type="checkbox"/>
Telephone	<input type="checkbox"/>
PostCode	<input checked="" type="checkbox"/>
StreetAddress	<input type="checkbox"/>
City	<input type="checkbox"/>
State	<input type="checkbox"/>
Country	<input type="checkbox"/>
LoyaltyId	<input checked="" type="checkbox"/>
ContactId	<input checked="" type="checkbox"/>
ContactId_Alternate	<input type="checkbox"/>
ContactId	<input type="checkbox"/>
ContactId_Alternate	<input type="checkbox"/>

Configure Search

Columns to index and search

Filtering



Expanded Card

Fills out as we build or solution

nts reserved.






3.3 Activities

Activities allow you to display customer events as a timeline in their unified profile

Activities

Manage your customer timeline and view all activity data in one place.

✔ Successful Updated: 5 days ago

Entity		Source		Event	Timestamp
✔	 eCommercePurchase  	eCommerce		ActivityTypeDisplay	PurchasedOn
	 posPurchases	PoS		ActivityTypeDisplay	PurchasedOn
	 webReviews	Website		ActivityTypeDisplay	ReviewDate
	SubscriberHistory	SubscriptionData		IsRecurring	SubscriptionStartDate
	UserLogs	SubscriptionData		TransactionName	TransactionDate

Use the Customer Card add-in or connect to Power BI to show activity in other apps

What are Activities?

Defined on the Activities page

Specific 'thing' to track

Email opened, POS purchase, Website Review, etc.

Appear on the Timeline




Require at least one attribute (field) of type Date

Activities

Manage your customer timeline and view all activity data in one place.

✔ Successful

Updated: 4 days ago

Entity	Source	Event	Timestamp
 eCommercePurchases	eCommerce	ActivityTypeDisplay	PurchasedOn
 posPurchases	PoS	ActivityTypeDisplay	PurchasedOn
 webReviews	Website	ActivityTypeDisplay	ReviewDate
SubscriberHistory	SubscriptionData	IsRecurring	SubscriptionStartDate
UserLogs	SubscriptionData	TransactionName	TransactionDate

Activities: Fields



Entity: Select an entity that includes transactional or activity data.



Primary key: Select the field that uniquely identifies a record. It shouldn't contain any duplicate values, empty values, or missing values.



Timestamp: Select the field that represents the start time of your activity.



Event: Select the field that is the event for the activity.



Web address: Select the field that represents a URL providing additional information about this activity. For example, the transactional system that sources this activity. This URL can be any field from the data source, or it can be constructed as a new field using a Power Query transformation. This URL data will be stored in the Unified Activity entity, which can be consumed downstream using APIs.



Details: Optionally, select the field that is added for additional details.



Activity Type: Define the activity type reference to Common Data Model that best describes the semantic definition of the activity.

Select your activity data

Entity *

eCommercePurchases : eCommerce

Primary key *

PurchaseId

Define the activity

Select the fields that will appear in your timeline.

Timestamp *

PurchasedOn

Event *

ActivityTypeDisplay

Web address

Details

Subject

Icon

Activity type

☒ Select from existing ☐ Create new

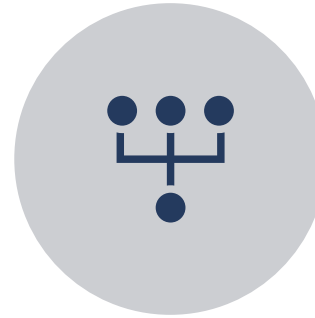
Select the activity type *

Purchase

Activities: Relationships



Activity entity field: Select the field in your activity entity that will be used to establish a relationship with another entity.



Customer entity: Select the corresponding source customer entity with which your activity entity will be in relationship. You can relate to only those source customer entities that are used in the data unification process.



Customer entity field: This field shows the primary key of the source customer entity as selected in the map process. This primary key field in the source customer entity is used to establish a relationship with the activity entity.



Name: If a relationship between this activity entity and the selected source customer entity already exists, the relationship name will be in read-only mode. If there no such relationship exists, a new relationship will be created with the name provided here.

Adding an Activity

- Identify:
 - Source entity
 - Primary key
 - Timestamp
 - Event
 - Type
- Connect entities
 - Matched fields

Edit activity

Select your activity data

Entity *

eCommercePurchases : eCommerce

Primary key * ⓘ

PurchaseId

Define the activity

Select the fields that will appear in your timeline.

Timestamp *

PurchasedOn

Event *

ActivityTypeDisplay

Web address

Details

Subject

Activity type

☒ Select from existing ☐ Create new

Select the activity type *

Purchase

Set up relationship

Connect your activity data to its corresponding customer by selecting the fields with matching data.

Activity

Entity

eCommercePurchases : eCommerce

Field *

ContactId

Customers

Entity *

eCommerceContacts : e...

Field *

ContactId

Name *

OnlinePurchases


3.4 Enriching data

Use data from sources like Microsoft and other partners to enrich your customer data.

Enrichment (preview)

Supplement your customer data with data from external sources including Microsoft and other partners.


Discover My enrichments

**AbiliTec Identity**
Provided by LiveRamp

Connect to your existing LiveRamp account to enrich your data with attributes like AbiliTec ID for better identity resolution.

0 in use | 10 available


Enrich my data

**Brands**
Data from Microsoft

Enrich your data with brand affinities and share of voice from people in a similar demographic to your customers.

1 in use | 0 available

Enrich my data

**Demographics**
Provided by Experian

Connect your existing Experian account to enrich your data with attributes like household size, income, and more.

0 in use | 10 available

Enrich my data**Enhanced addresses**
Data from Microsoft**Interests**
Data from Microsoft**Location**
Data from Microsoft Azure Maps**Location**
Provided by HERE Technologies**Secure File Transfer Protocol (SFTP) custom ...**
Provided by Microsoft

Data Enrichment: what is it?

Brand Affinity

Category Interest

Similar profiles to customers based on demographics

Online search data from the Microsoft Bing

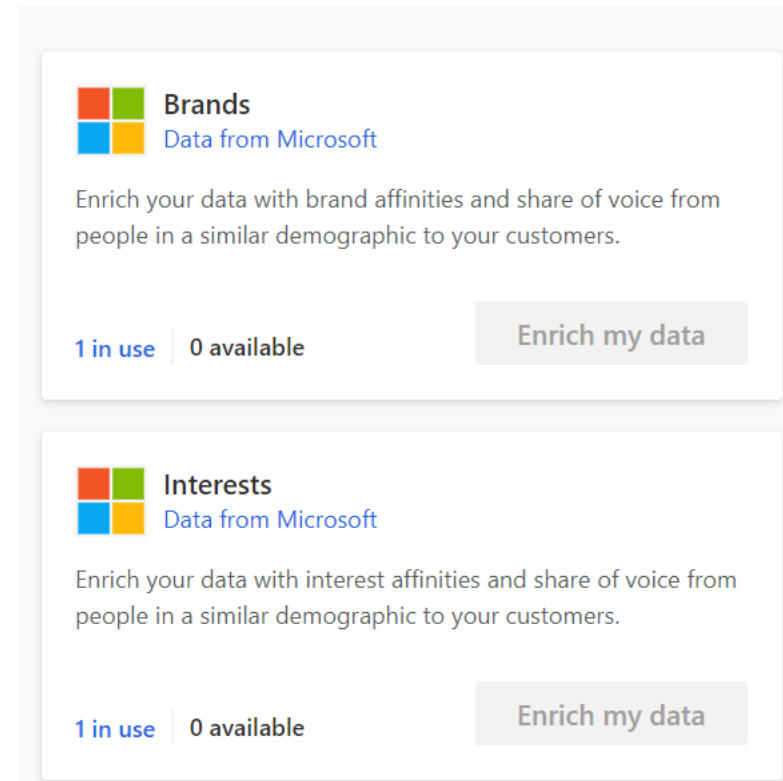
Regional Considerations:

Supported in Australia, Canada (English), France, Germany, United Kingdom, United States (English).

When choosing your own brands, industry, suggestions are provided based on the country/region.

When mapping fields if country/region is not mapped then Graph data from chosen country will be used.

When enriching profiles, all customer profiles for which Microsoft Graph data is available for the selected brands and interests will be enriched, including profiles that are not in the selected country/region.



The screenshot displays two sections for data enrichment. The top section, titled 'Brands', features the Microsoft logo and the text 'Data from Microsoft'. It describes the enrichment process: 'Enrich your data with brand affinities and share of voice from people in a similar demographic to your customers.' Below this, it shows '1 in use' and '0 available' with a button labeled 'Enrich my data'. The bottom section, titled 'Interests', also features the Microsoft logo and 'Data from Microsoft'. It describes the enrichment process: 'Enrich your data with interest affinities and share of voice from people in a similar demographic to your customers.' Below this, it shows '1 in use' and '0 available' with a button labeled 'Enrich my data'.

Demographics Matching

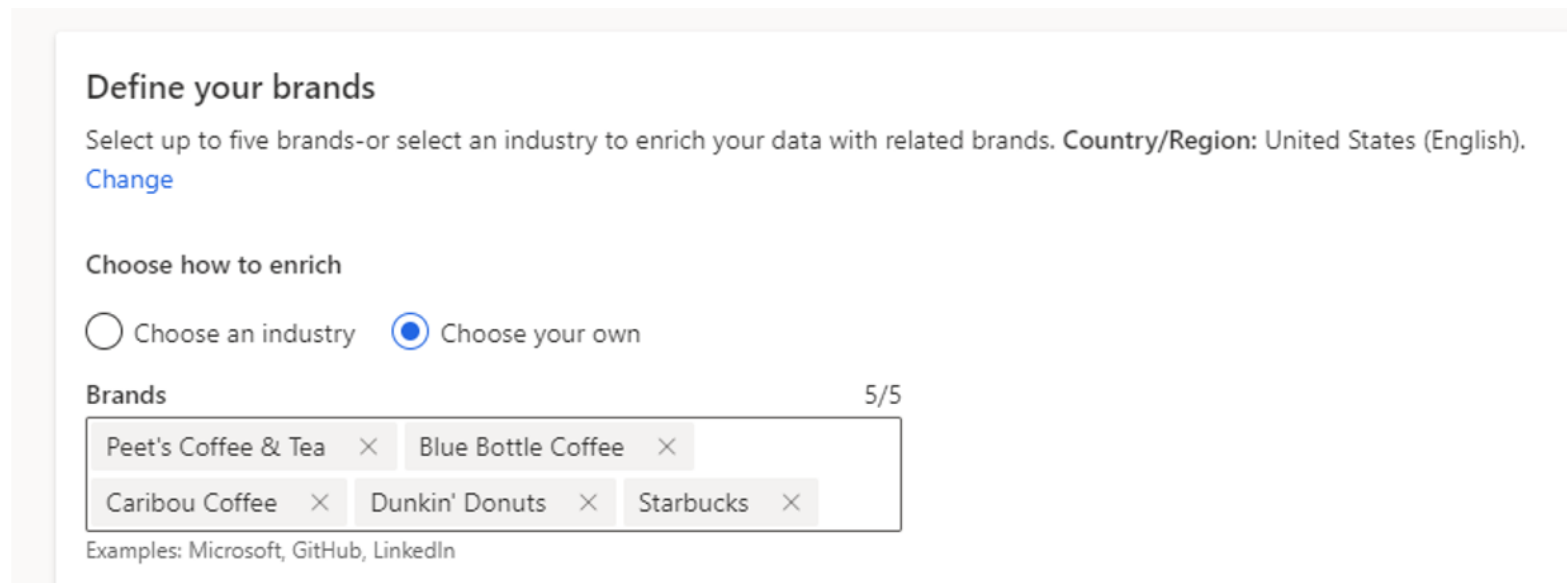
Attribute	Format	Supported values
Date of Birth	Convert to DateTime during ingestion (recommended)	String in <u>ISO 8601</u> format: "yyyy-MM-dd" or "yyyy-MM-ddTHH:mm:ssZ".
Gender		Male, Female, Unknown
PostalCode	Five digits for US, Standard code elsewhere	
City	City name in English	
State/Province	Two-letter abbreviation for the US and Canada. Two or three letter abbreviation for Australia. Not applicable for France, Germany, or the UK.	
Country/Region	US : United States of America, United States, USA, US, America CA : Canada, CA GB : United Kingdom, UK, Great Britain, GB, United Kingdom of Great Britain and Northern Ireland, United Kingdom of Great Britain AU : Australia, AU, Commonwealth of Australia FR : France, FR, French Republic DE : Germany, German, Deutschland, Allemagne, DE, Federal Republic of Germany, Republic of Germany	

Brand & Category

Choose on my own: choose brands and categories of interest to get affinities for those selections.

Industry's top brands and categories: For a selected industry, get the brands and interests that your customer base has the highest affinity for.

Customer base refers to the customer profiles that are similar to the ones defined in the Demographics section.



The screenshot shows a web interface for defining brands. It includes a title 'Define your brands', a description 'Select up to five brands-or select an industry to enrich your data with related brands. Country/Region: United States (English).', a 'Change' link, a 'Choose how to enrich' section with two radio buttons ('Choose an industry' and 'Choose your own'), and a 'Brands' section with a list of five brands: Peet's Coffee & Tea, Blue Bottle Coffee, Caribou Coffee, Dunkin' Donuts, and Starbucks. Each brand has a close button. The total count '5/5' is shown. Examples of brands like Microsoft, GitHub, and LinkedIn are listed at the bottom.

Define your brands

Select up to five brands-or select an industry to enrich your data with related brands. Country/Region: United States (English).
[Change](#)

Choose how to enrich

☐ Choose an industry ☒ Choose your own

Brands 5/5

Peet's Coffee & Tea × Blue Bottle Coffee ×
Caribou Coffee × Dunkin' Donuts × Starbucks ×

Examples: Microsoft, GitHub, LinkedIn

Affinity score & Confidence

The **affinity score** is calculated on a 100-point scale, with 100 representing the segment that has the highest affinity for a brand or interest.

The **affinity confidence** is also calculated on a 100-point scale. It indicates the system's confidence level that a segment has an affinity for the brand or interest.

Confidence level is based on the segment size and the segment granularity.

Segment size is determined by the amount of data we have for a given segment.

Segment granularity is determined by how many attributes (age, gender, location) are available in a profile.

Enriching data

Options will vary depending on provider

Define your interests

Select up to five interests-or select an industry to enrich your data with related interests. Country/Region: United States (English)
[Change](#)

Choose how to enrich

☐ Choose an industry ☒ Choose your own

Interests 5/5

Beverages ×

Coffee ×

Tea ×

Coffee & Espresso Makers ×

Breakfast Foods ×

Examples: Software, Sports, Food

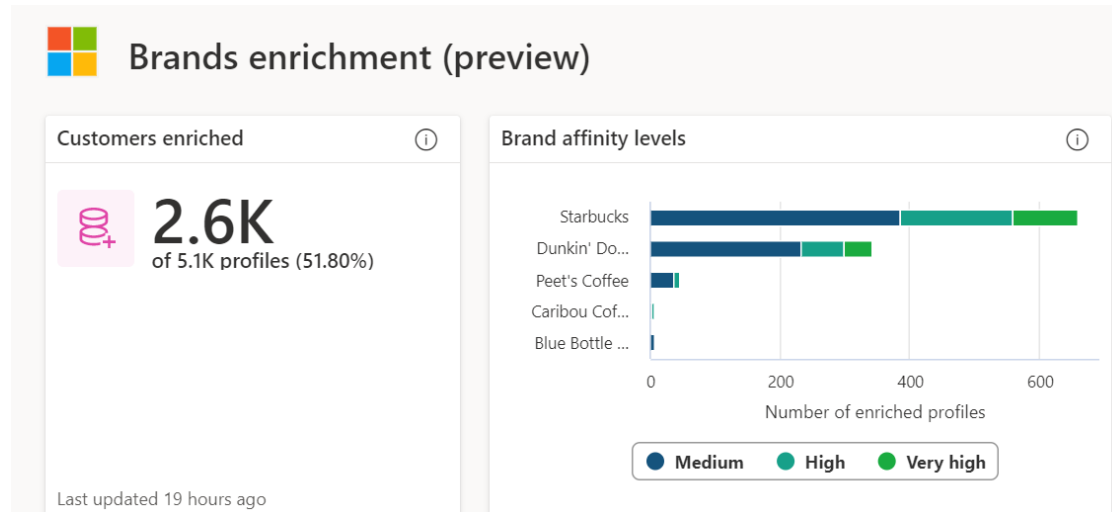
Map your fields

Review your fields and make any necessary changes.

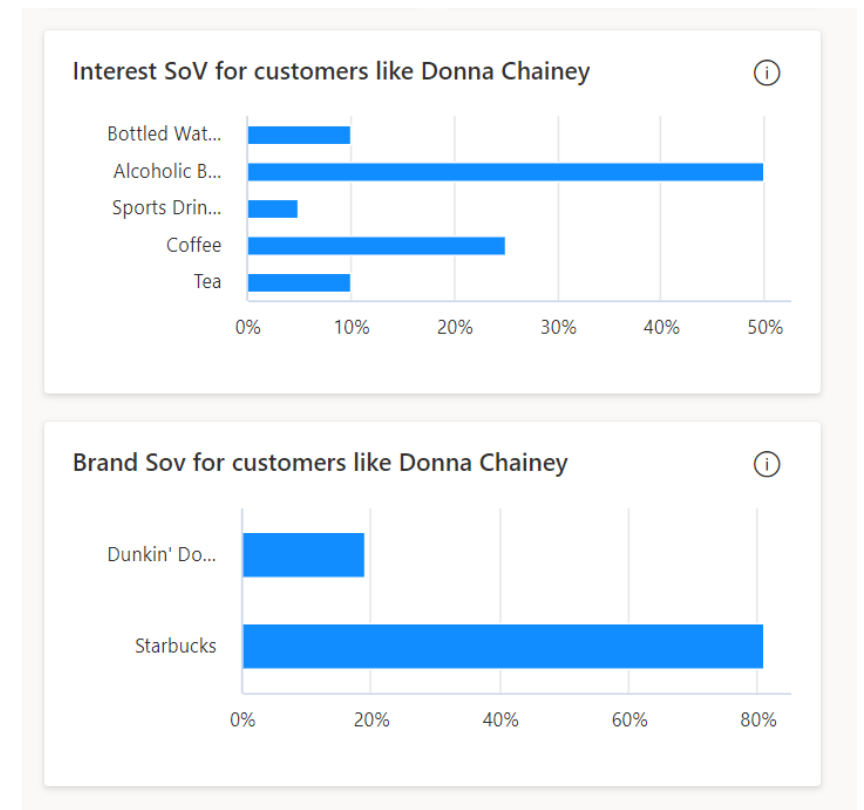
Date of birth	DateOfBirth
Gender	Gender
Country/Region	Country
Postal code	PostCode

Viewing Enriched Data

Enrichment page



Customer profile



Lab 3

In this lab, you will use the environment you configured in Labs 1 and 2

You will:

- Generate Segments for use by Marketing
- Setup search and indexing for customers
- Configure Activities within Customer Insights
- Set up Data Enrichment

Estimated time: 45 mins.