Workshop Argoleaf

Customer Insights

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1. Introduction

Different to traditional approaches for realising a 360-degree view of the customer with a large amount of coding involved, Dynamics 365 Customer Insights (CI) is a finished SaaS solution which allows you to adopt an agile project management approach and deliver value in a matter of weeks. By attending this Hands-on Lab, you will learn step-by-step how to set up, configure and use Dynamics 365 Customer Insights. To bring this to life, we are looking at a typical customer analytics project for our example company, Argoleaf. We will introduce the business pain points, goals and high-priority use cases that Argoleaf has identified around their customer data initiative, and then realise a working prototype solution today.

Introducing Argoleaf

Argoleaf makes sure customers have energy in their home to power their appliances and anything else needing energy. They try to do this in a sustainable way by encouraging the use of solar panels and generating energy with wind turbines.

Argoleaf wishes to deliver better and more personalized service to their customers. However the data landscape isn't quite ready for this as it's quite splintered. We'll be helping them by creating customer profiles containing all the information they need.

Business Objective

Argoleaf wishes to own and build a meaningful, direct relationship with all consumers to deliver an exceptional, personalised customer experience through relevant communications, personalised recommendations and services.

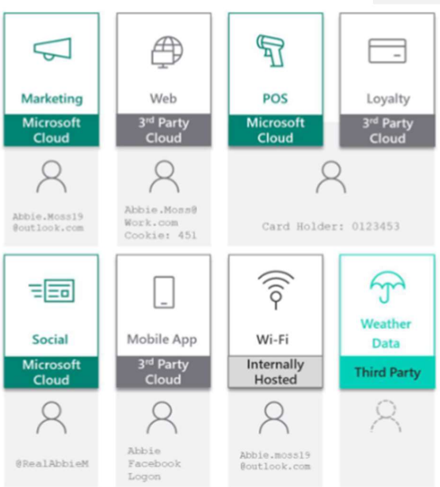
Tasks

- Create a customer data hub combining all customer related data from siloed sources.
- Realise a unified Argoleaf Customer profile.
- Create relevant measures and segments.

Fractured Customer Data
With multiple systems, Argoleaf has multiple records for the same person. This causes a disjointed experience to the customer who expects to be treated as one person regardless of the channel they are transacting upon.

Multiple Platforms
The architecture at Argoleaf has evolved through acquisition and legacy systems meaning that data can reside in not only different systems, but different platforms across multiple clouds and on premise.

Non-Customer Data
Argoleaf are drawing correlations between non-customer data and the impact it has on customer experiences, including data from third parties such as CBS.



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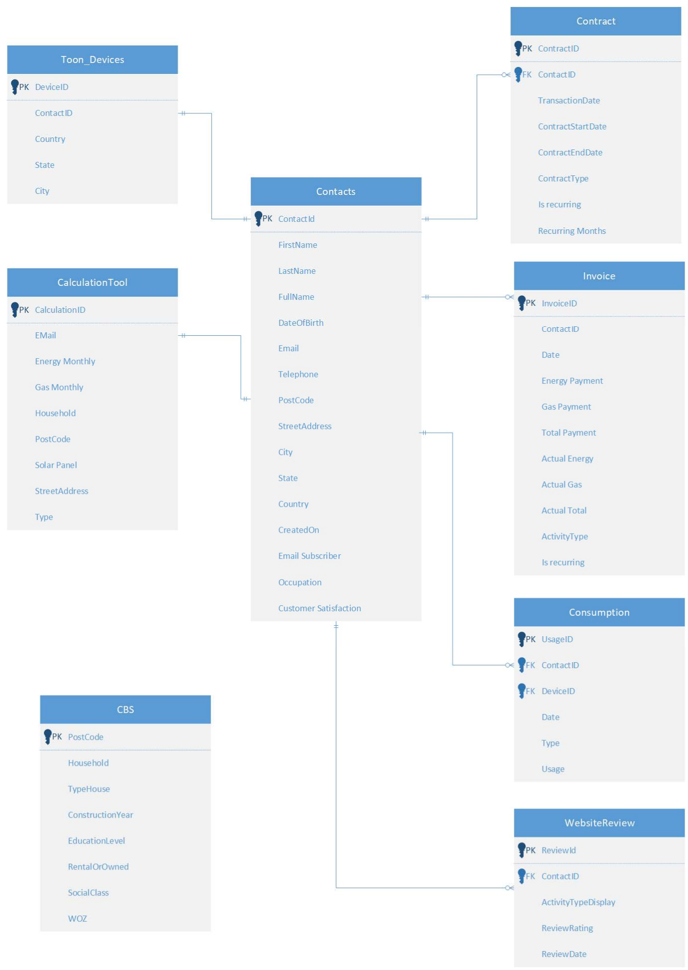
Argoleaf Customer Insights Project

You have been selected as the project manager for the implementation of Dynamics 365 Customer Insights at Argoleaf Coffee. As an experienced project manager, you devise the following plan:

1. Create a Customer Insights environment
2. Ingest data from highest priority data sources from within the business
3. Configure and realise a unified customer profile from ingested data
4. Configure business and customers measures in Customer Insights to identify customers with certain characteristics
5. Build sample customer segments for Marketers to deliver personalised and targeted marketing communications

Data sources within the project



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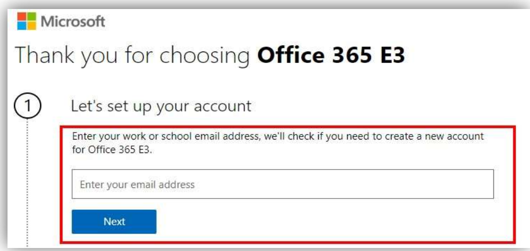
2. Sign up for trials

This appendix contains step-by-step instructions to provision and configure a Customer Insights environment, including prerequisites. This should only be followed if the environment has not been set up for your training session. If it has, please complete the next chapter instead of this appendix.

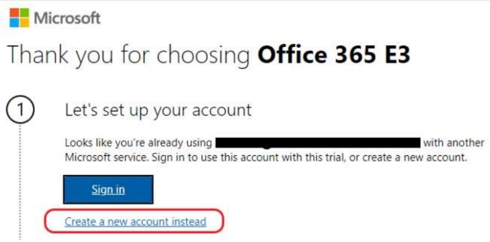
Note: completing this lab requires enrolling in certain Microsoft cloud services using trial subscriptions. You may need to supply your own telephone number and a credit card to subscribe. To avoid charges, remember to cancel your trial subscriptions at the end of the course, or before the trial periods end (durations vary by product).

Step 1 - Office 365 Trial

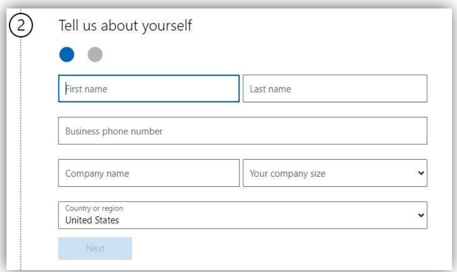
The first step in the process is to create an Office 365 tenant for your user accounts. Open an "in private" browser window and navigate to [https://aka.ms/appinadayo365signup.](https://aka.ms/appinadayo365signup) Fill in your email address and click **Next**



On the next screen, you will want to click on the **Create a new account instead**



You are now able to fill in information about yourself, then click **Next**



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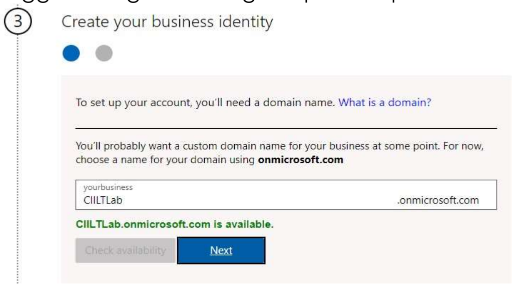
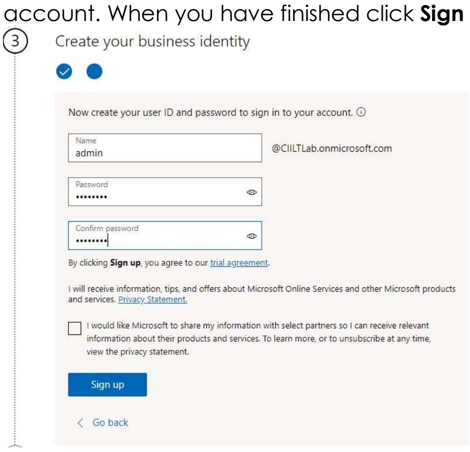
Now you will be asked for a phone number to text or call with a verification code.

After entering the verification code and continuing you will next be able to choose your business identity. You will need to provide a company (tenant name). We suggest using something unique and personal to you, your name may work.



Finally, you will need to create your admin account and a password for it. We recommend using 'admin' for your email address as that is the account you are creating.
You'll have something like admin@Argoleafenergy.onmicrosoft.com for your account. When you have finished click **Sign up**.



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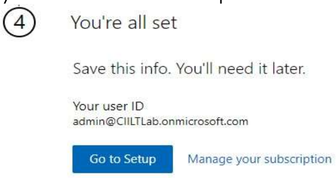
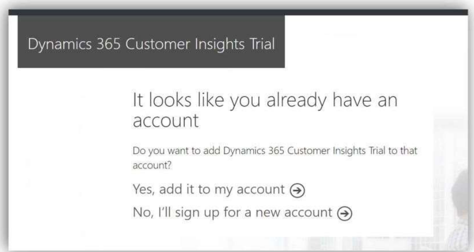
Once everything completes you will get a page like this where you can click **Go to Setup** if you'd like to setup mail or install office apps. For the purposes of this training you are done at this point and do not need to do either of those things.

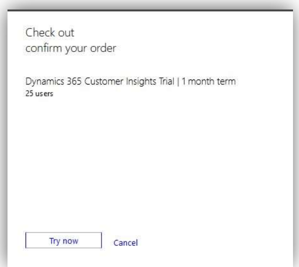


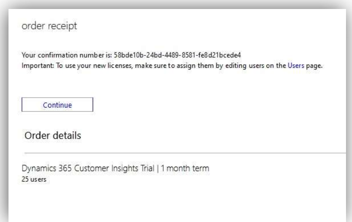
Step 2 – Sign up for Dynamics Marketing
Go to https://trials.dynamics.com in an incognito browser and scroll down until you see Dynamics 365 Marketing.
Click on Try for free, enter the email address you just created an make sure to agree to any T&Cs. Once you've done this you can 'Start your free trial'. Select the same region as the one you selected in the previous step and your phone number. After this you can officially start your trial and move on to create the Customer Insights trial.

Step 3 – Sign up for Customer Insights Trial
Let's request our Trial of Customer Insights. Open a new "in private" browser instance and navigate to [https://aka.ms/tryci.](https://aka.ms/tryci)
On the page you see, click on '**Yes, add it to my account'**



This will kick off the process to add 25 user licenses for a trial to your tenant. First, you will need to click the **Try now** button on the Confirm your Order page.





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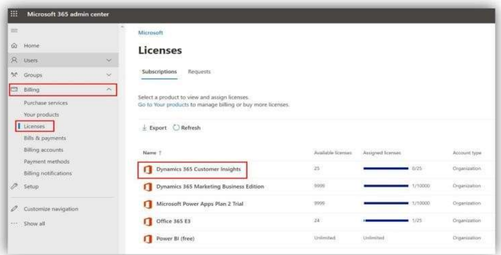
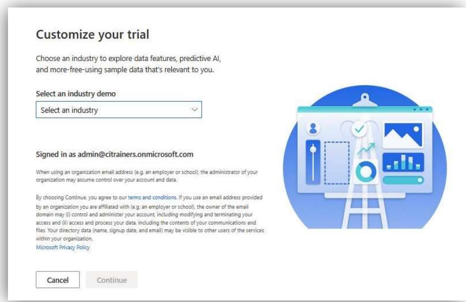
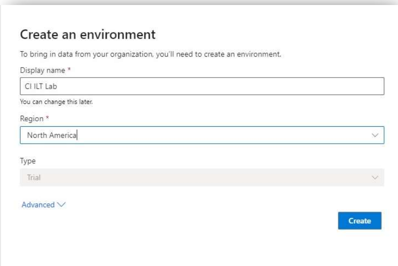
Click **Continue.** It will open the Microsoft 365 admin page. Here you need to assign CI license to the admin user you created.
Expand the **Billing** menu option and click on **Licenses** and then click on **Dynamics 365 Customer Insights.**



Click on +**Assign licenses.** Choose your admin account in the right pop up menu and click **Assign.**
Open https://home.ci.ai.dynamics.com/Start.
The first screen is labeled **Customize your trial**. Choose an industry to load the demo environment where you can explore all the pre-setup features and insights with the chosen industry demo data. Let's choose **Retail** and review the terms and conditions and click **Continue.**



Next you will create the environment. We suggest you name it Argoleaf Lab. Enter an environment name and select the region. Make sure to add the first part of your Dynamics Marketing link in the Dataverse field and click **Create**.



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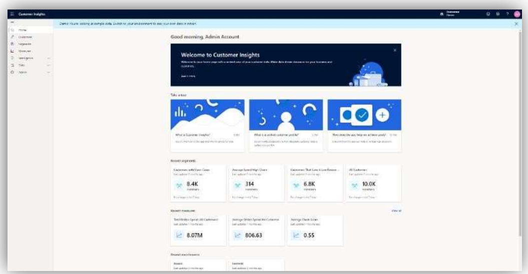
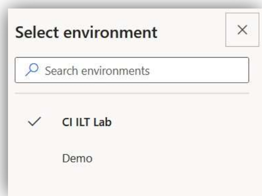
Once it completes you will be at the landing retail demo page for Customer Insights. Switch to your environment by clicking on top right at **Environment** and you are good to start on the labs.





3. Customer insights

Before you actually start working in Customer Insights you might want to take a look at the Quick Reference sheet. This will help you when working on certain parts of the workshop or fix some issues you might have.

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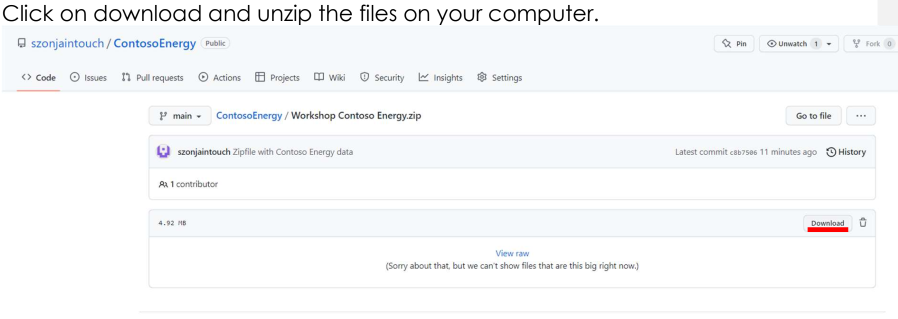
4. Ingesting data sources

To create the customer profiles let's start by ingesting our data sources. You can find these data sources in GitHub.

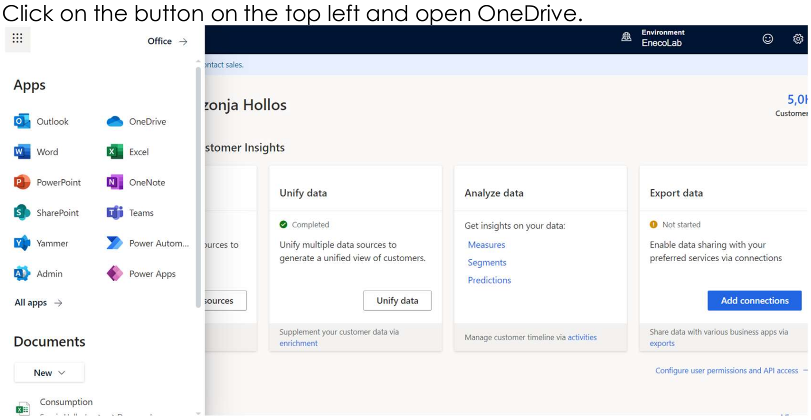
Data source	Link
Contacts	https://github.com/szonjaintouch/ArgoEnergy
Toon_Devices	
CalculationTool	
Contract	
Invoice	
Consumption	
WebsiteReview	
CBS	

Task 1: Prepare files

- Go to the link in the table above and click on Workshop Argoleaf.zip.
- Click on download and unzip the files on your computer.



- Go to https://home.ci.ai.dynamics.com/ and log in with the account you created.
- Click on the button on the top left and open OneDrive.



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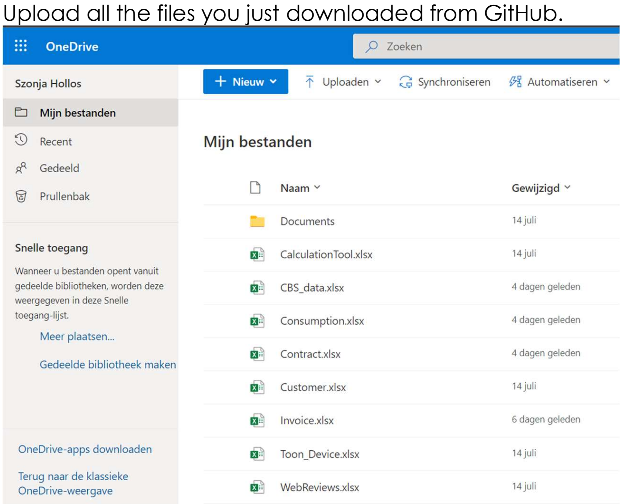
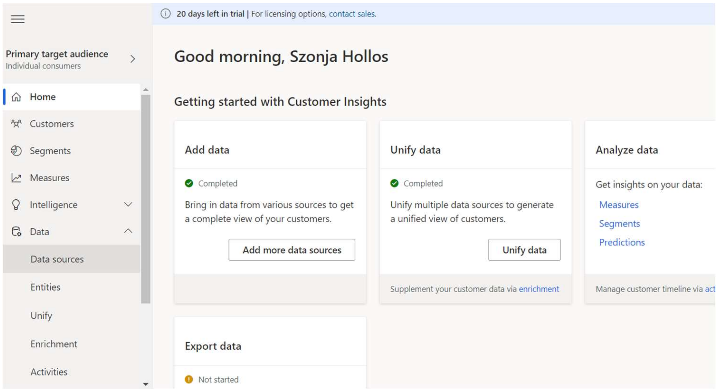
- Upload all the files you just downloaded from GitHub.



- Go back to your Customer Insights environment.

Task 2: Ingest data from Customer

- Click on the Data tab in the menu on the left and then click on Data sources.



- Click on Add data source and make sure to select the Microsoft Power Query option. Name the data source 'Contacts'. Click next to move on to the next step.

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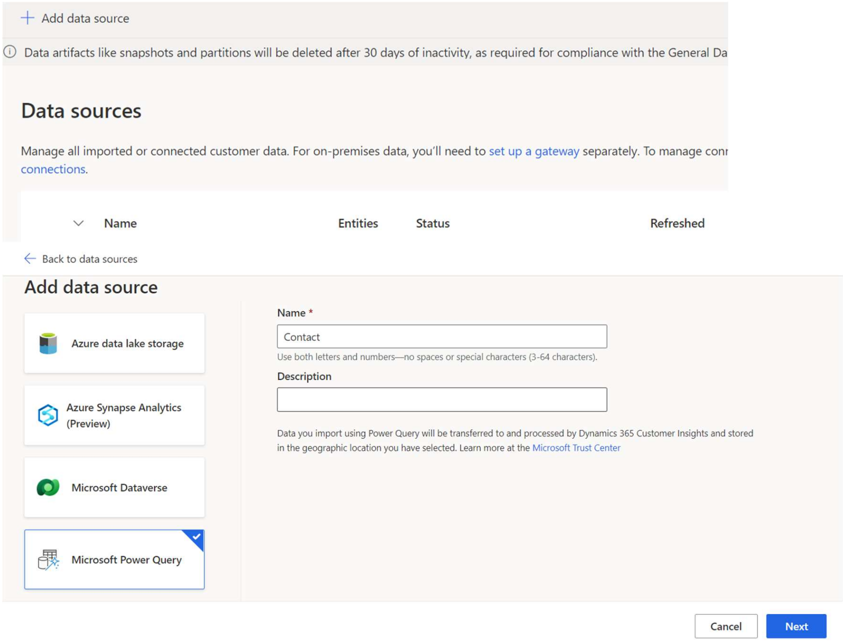
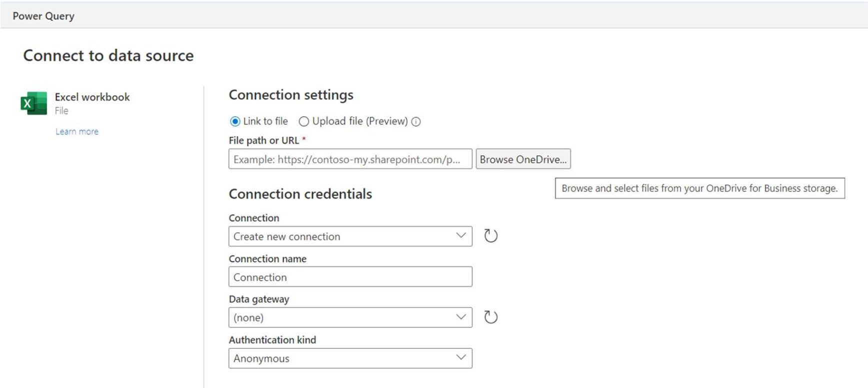


- Select the Excel workbook option and click on Browse OneDrive to select the Customer.xlsx file. Click on next again.



- You might see 2 tables. These contain the exact same data so you can choose either of them. It is recommended that you pick ‘Customer’. After this click transform.

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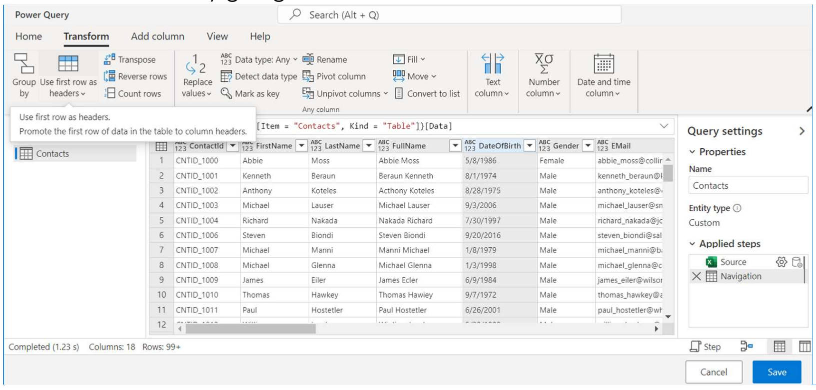
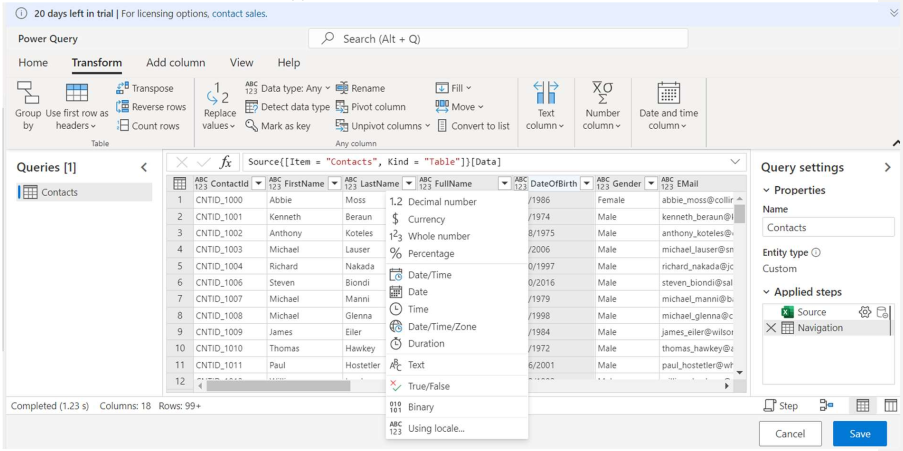
- Now we have to transform our data. We have to start by making sure the first row is used as header by going to ‘Transform’.



- After this let’s set the data types by clicking on the icon next to the column name. DateOfBirth will be a date type while CreatedOn becomes date/time.



- Save the data source and run it.

Task 3: Ingest data from Toon_Devices

- Follow the same steps as in the task above. Now name the data source ToonDevices.
- To transform the data we only have to make sure the first row is used as header and the table is named ‘Devices’ before saving and running the data source.

Task 4: Ingest data from CalculationTool

- Follow the same steps and name the source CalculationTool. Transform the data by making sure the first row is used as header. Set the Gas Monthly and Energy Monthly column to ‘Currency’ and household to whole number.
- Save and run the data source.

Met opmerkingen [DK1]: I am missing the step "Choose the correct Table" and then click transform

For example, Customer.xlsx contains two tables (they seem to contain the same data)

Met opmerkingen [DK2]: I am missing the step of "renaming the table" within "transform data"

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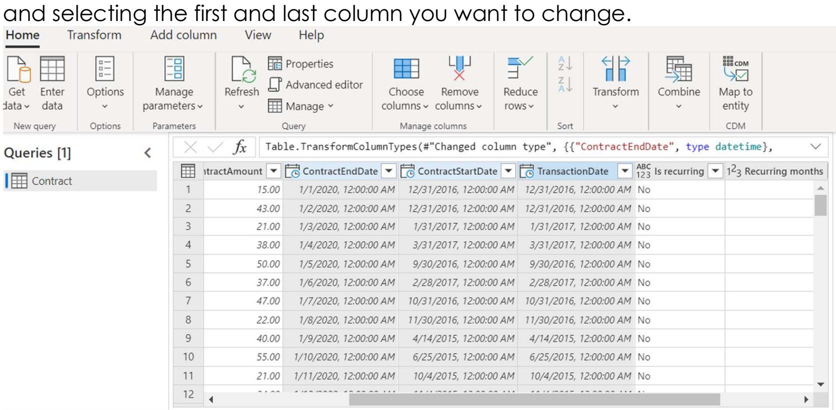
Task 5: Ingest data from Contract

- When configuring the Contract data source make sure to assign the currency data type to ContractAmount,
- Next set ContractEndDate, ContractStartDate and TransactionDate to datetime. You can make changes to multiple columns next to each other by holding shift and selecting the first and last column you want to change.



- Set the Recurring Months column to whole number before saving and running the data source.

Task 6: Ingest data from Invoice

- Let's add our Invoice data source. Use the first row as header once again.
- Select all columns from 'Gas Payment' to 'Actual Total' and assign the currency data type. After that set the date column to datetime.
- Change the name of the data source to 'Invoice'.
- Save and run the data source.

Met opmerkingen [DK3]: table needs renaming

Task 7: Ingest data from Consumption

- Call the data source Usage and make sure the first row is used as header,
- Assign the currency datatype to the Usage column.
- Save and run the data source.

Task 8: Ingest data from WebsiteReviews

- Follow the same steps as the other data sources. Set ReviewDate to datetime and ReviewRating to whole number.
- Save and run the data source before moving on to the last data source we have to ingest.

Task 9: Ingest data from CBS

- For the CBS data source we can follow the same steps again. This includes naming the file 'CBS'.
- Set Household to whole number before saving and running the data source.

Met opmerkingen [DK4]: table needs renaming

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You might need to wait for a bit before moving on to the next chapter as you will only be able to move on once every data source has loaded.

5. Unifying data

Having ingested the raw data from your data sources into entities you will now begin the Map, Match, Merge process to create a single Unified Customer Profile by merging data from each customer profile source.

To do this you will first map your ingested entities against a standard model and select the Primary Key for each of your profiled entities. Following the completion of this you will then create your Match Rule that will be used to match contacts from all customer entities.

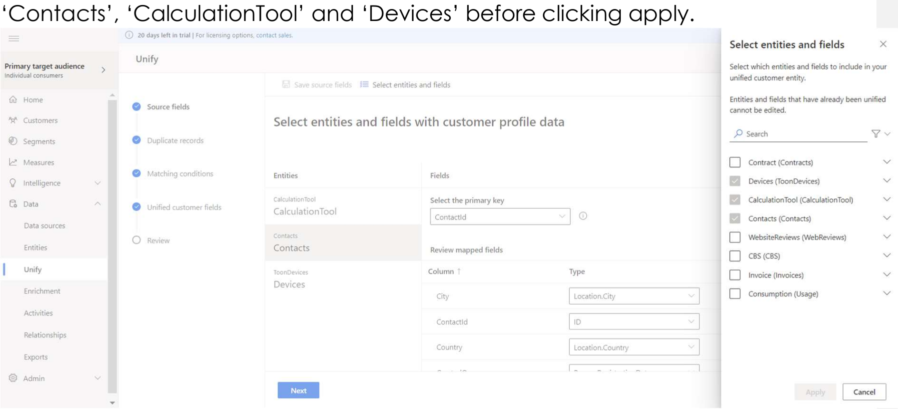
Finally, running the Merge process will create a single set of unique Customers having matched profiles from all customer entities using your match rules.
Your objective is to find out how many unique customer profiles Argoleaf has across various data sources.

Warning: after completing the unification process it's <u>not</u> possible to delete any source without resetting the environment.

Task 1: Source fields

The first step in the unification process consists of mapping the data. This means we will select the entities containing customer profile data.

- Click on 'Select entities and fields' and make sure to select all fields from 'Contacts', 'CalculationTool' and 'Devices' before clicking apply.



- Enable 'Intelligent mapping' if it wasn't enabled automatically.

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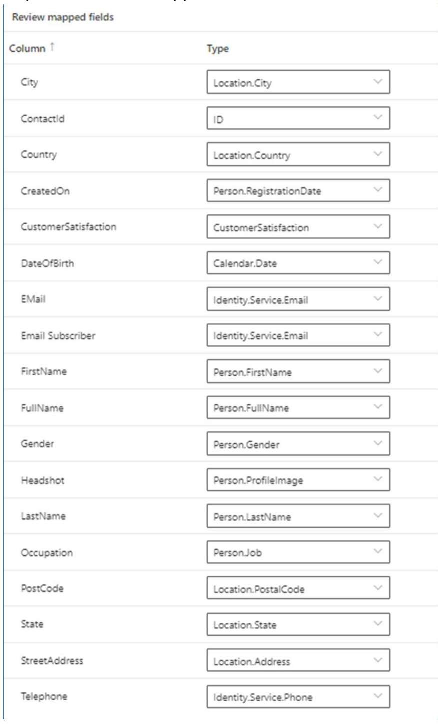
- Start by mapping Contacts as shown below and set ContactId as the primary key. Some field types have to be filled in manually.


Review mapped fields

Column	Type
City	Location.City
ContactId	ID
Country	Location.Country
CreatedOn	Person.RegistrationDate
CustomerSatisfaction	CustomerSatisfaction
DateOfBirth	Calendar.Date
EMail	Identity.Service.Email
Email Subscriber	Identity.Service.Email
FirstName	Person.FirstName
FullName	Person.FullName
Gender	Person.Gender
Headshot	Person.ProfileImage
LastName	Person.LastName
Occupation	Person.Job
PostCode	Location.PostalCode
State	Location.State
StreetAddress	Location.Address
Telephone	Identity.Service.Phone

Met opmerkingen [DK5]: There are some fields that require the user to manually write down the label. I miss the instruction on that

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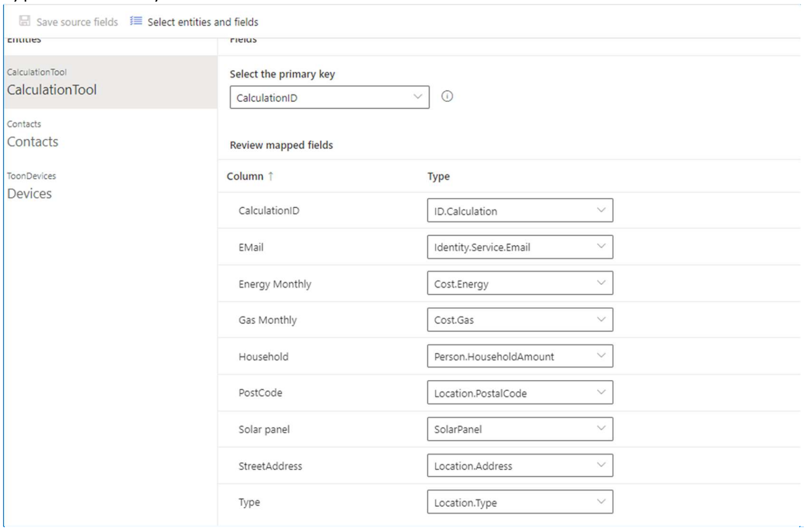
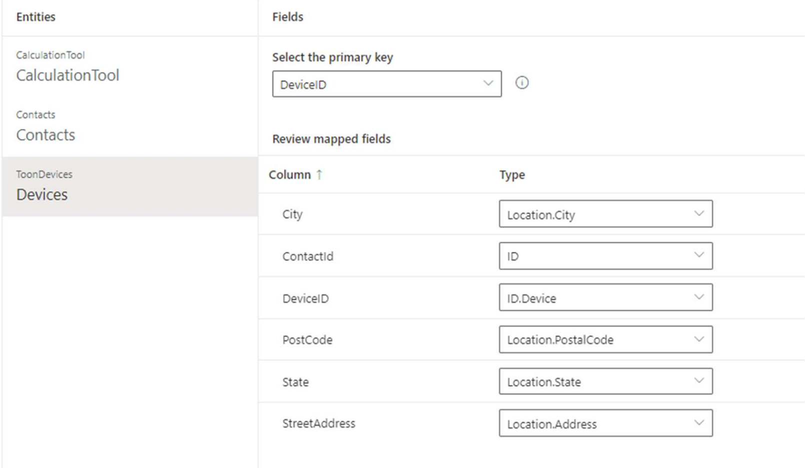
- Map CalculationTool as follows, keeping in mind you might have to add some types manually:



Met opmerkingen [DK6]: same manual input, no instructions

- Lastly map the Devices data source as follow, keeping in mind you might have to add some types manually:



- Save the source fields and click next. Once you can see the number of fields you mapped it should be 33.

Met opmerkingen [DK7]: I have 33 map fields, would be useful to include the number? so everyone can check if they are in the same page

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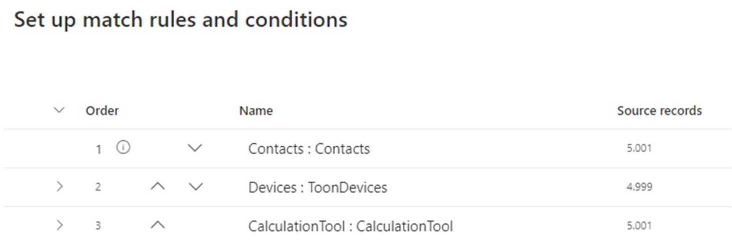
Task 2: Duplicate records and Matching conditions

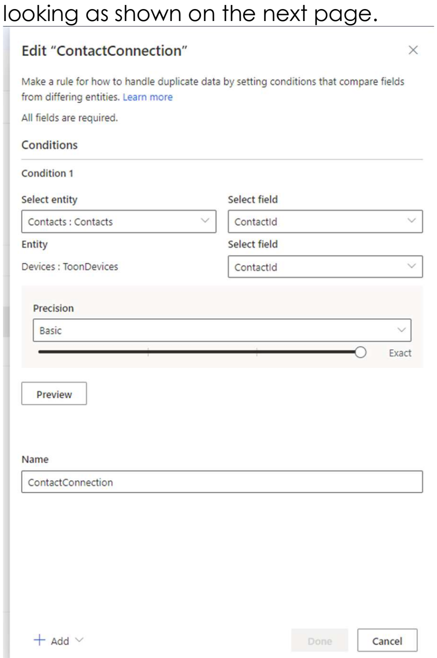
Continuing the process we have to match our data. We won't be setting any rules for duplicate records so we can move on to 'Matching conditions' right away.

- You'll want to make sure the order of the data sources is as follows:



We have to do this because the primary entity should be the one with most complete and trusted customer profile data.

- Add a rule for the Devices data source. We want to compare the ContactId from both sources. We want them to match with an exact precision which means they have to match 100% to count as the same customer. Your rule should end up looking as shown on the next page.



You can get an idea of the matches made by clicking on Preview after saving the match rules. Look at the picture on the next page to get an idea of what it looks like. For now we'll move on to the next rule.

Met opmerkingen [DK8]: Preview is not available until you click "Sace & Close"

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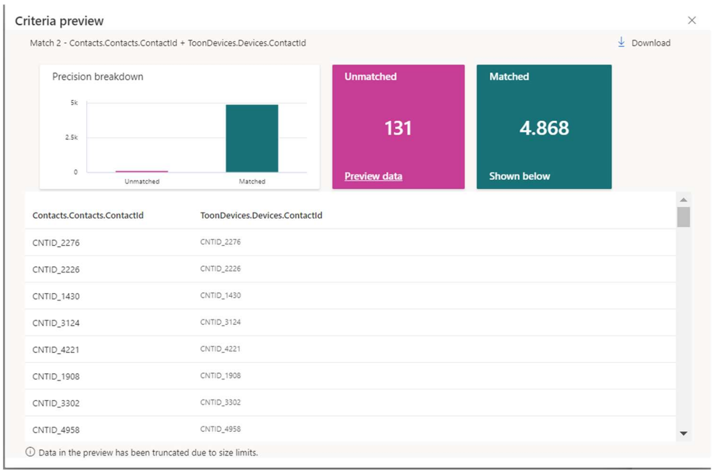
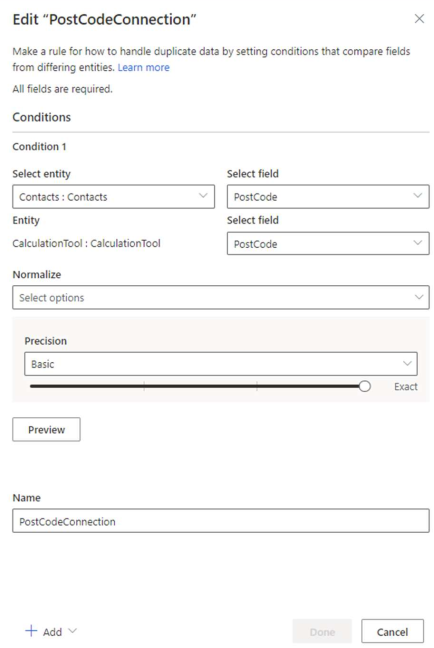


You might see that not every record has been matched. This could mean there's a mistake somewhere or that a certain device is not (yet) connected to a customer.

- Click done before moving on to add another rule.
- Add a rule for CalculationTool. This time we want to compare postal codes.
- Select the Contacts entity first and select the PostCode field for both data sources. For our precision level let's select exact once again.



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- At last make sure to select 'Include all records' for all three data sources. The reason for this is illustrated below. Click next after doing this.

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Task 3: Unified customer fields/Merge

In this step, you will create a simple rule used to match records together. Rules can consist of single (e.g. based on ID) or multiple conditions (e.g. Full Name, Postcode, Date of Birth). You can change the order of these records by dragging them. There's an icon on the left of every record when you hover over it. Drag it by clicking on this icon and holding on to it until the record is at the right place. Copy the order from the image below.

Order	Rank	Name	Entity	Source
1		ContactId	Devices	ToonDevices
2		FirstName	Contacts	Contacts
3		LastName	Contacts	Contacts
4		FullName	Contacts	Contacts
5		DateOfBirth	Contacts	Contacts
6		Gender	Contacts	Contacts
7		EMail (2)		
	1	EMail	Contacts	Contacts
	2	EMail	CalculationTool	CalculationTool
8		Email Subscriber	Contacts	Contacts
9		Telephone	Contacts	Contacts
10		PostCode (3)		
	1	PostCode	Contacts	Contacts
	2	PostCode	Devices	ToonDevices
	3	PostCode	CalculationTool	CalculationTool
11		StreetAddress (3)		
	1	StreetAddress	Contacts	Contacts
	2	StreetAddress	Devices	ToonDevices
	3	StreetAddress	CalculationTool	CalculationTool
12		City (2)		
	1	City	Contacts	Contacts
	2	City	Devices	ToonDevices
13		State (2)		
	1	State	Contacts	Contacts
	2	State	Devices	ToonDevices
14		Country	Contacts	Contacts
15		CreatedOn	Contacts	Contacts
16		Headshot	Contacts	Contacts
17		Occupation	Contacts	Contacts
18		CustomerSatisfaction	Contacts	Contacts
19		Gas Monthly	CalculationTool	CalculationTool
20		Energy Monthly	CalculationTool	CalculationTool
21		Solar panel	CalculationTool	CalculationTool
22		Type	CalculationTool	CalculationTool
23		Household	CalculationTool	CalculationTool

Back Next

- Click next and create customer profiles. Now wait until you can see customer profiles.

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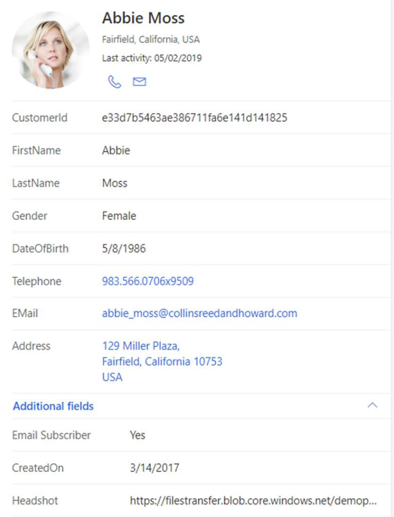
6. Defining relationships

Congratulations! You have created a unified customer profile. Let's search for 'Abbie Moss' in the Customers search field. You should see the following customer profile:

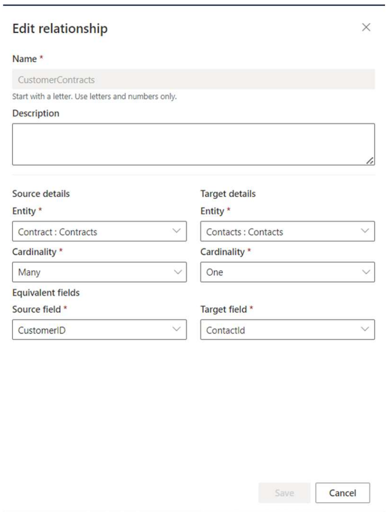


However as you can see the profile itself is still quite empty. To create a more interesting customer profile let's define some relationships between our customer data and non-customer data (the data sources we didn't use in the unification process). These relationship enable us to create activities to enhance the customer profile and add external data sources that aren't part of the unified customer profile.

Task 1: Relationship between customers and contracts

Let's create our first relationship which will be between customers and contracts.

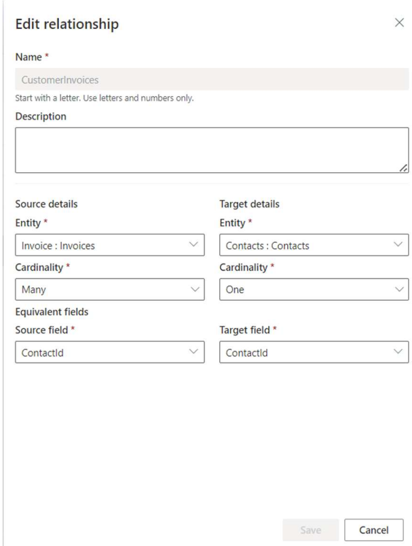
- Give the relationship a name that makes it easy to figure out what entities are involved.
- Select the Contract entity under Source details and the Contacts entity under Target details.
- Next let's set the cardinality, cardinality defines how many instances of one entity are related to instances of another entity. We want 'many' contracts to be connected to 'one' contact.
- Now select CustomerID as your Source field and ContactId as your Target Field. Your relationship will look as shown on the next page.



- Click save and move on to the relationship between customers and invoices.

Task 2: Relationship between customers and invoices

- The relationship between these two is set up almost exactly the same as the previous one. Copy the relationship as shown in the image below.



- Save the relationship.

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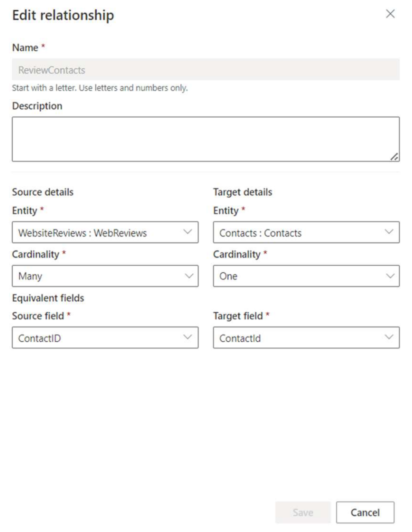
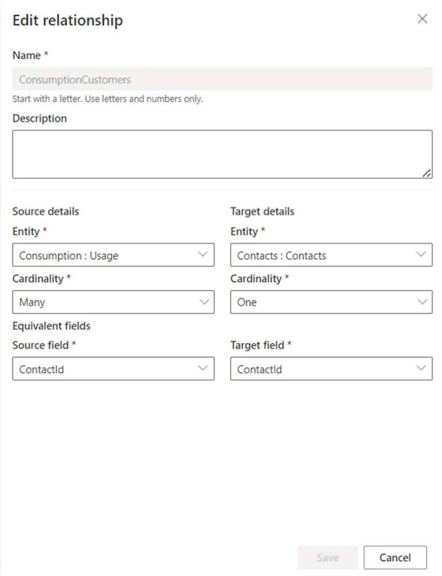
Task 3: Relationship between customers and reviews

- Copy the image below when creating a new relationship between the customers and reviews.



Task 4: Relationship between customers and consumption

- Create another relationship between customers and their consumption.



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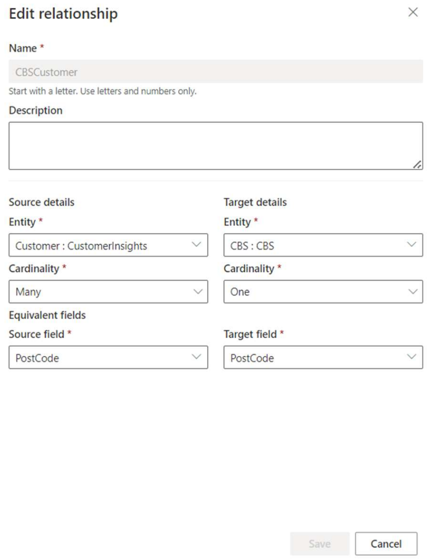
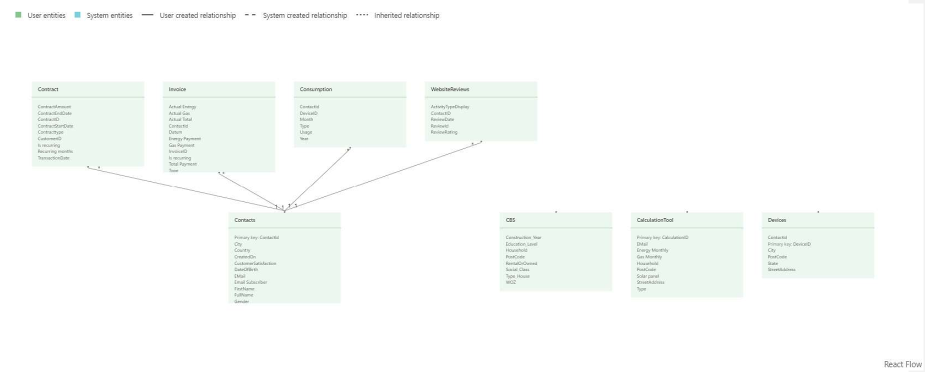
Task 5: Relationship between CBS and customers

- This relationship is slightly different to the rest as it is an external data source that will not be shown in the activity timeline in any way.
- Make sure the Source details have the ‘customer’ entity with cardinality ‘many’ and PostCode as Source field.
- The target details should be the ‘CBS’ entity with cardinality ‘one’ and PostCode as Target field.
- Save the relationship.



Let’s take a look at the Visualizer. Here you can see your relationships in a different way. It might look like the image below, but you could also change it into a horizontal layout.



Let’s move on to actually setting up our customer’s activities.

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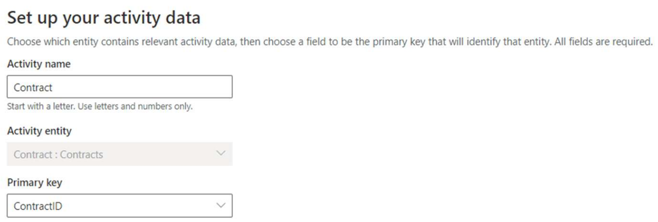
7. Setting up activities

The Activities capability helps consolidate customer activities from various data sources. This creates a customer timeline view of all customer interactions against your unified customer profile. Business analysts can configure activities to be displayed on a customer dashboard with a timeline view, which can be embedded in business applications.

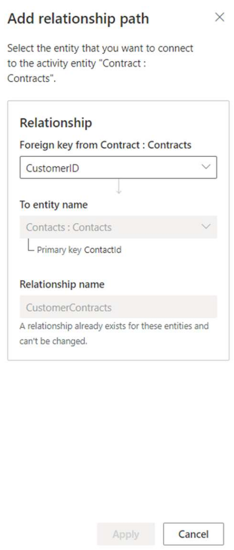
Interactions are any customer touch points – these could include purchases, customer service cases, emails, phone calls, branch visits, web, social activity. In other scenarios interactions could also be data gathered from connected devices, withdrawals or deposits in banking, entry/exist of a premises or area etc. We'll be setting up contract, invoice and review activities.

Task 1: Set up Contract activity

- Click on add activity.
- Name the activity Contract and select ContractID as Primary Key. Click next.



- Add the relationship. You'll be notified the relationship already exists. It will look as follows:



-

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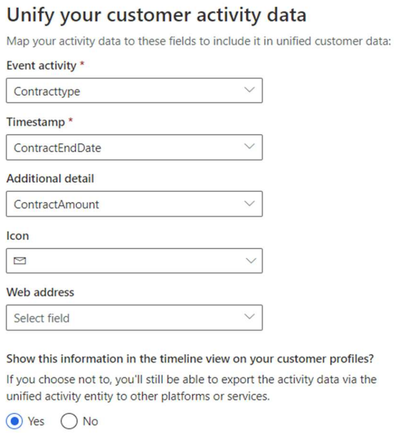
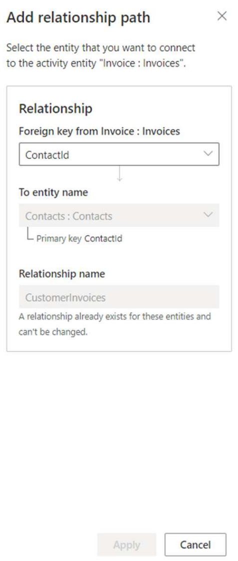
- After applying it click next.
- Unify your customer activity data as shown in the image below.



- Click next and set the activity type to Subscription.
- Review and save the activity. Don’t run it yet.

Task 2: Set up Invoice activity

- Click on add activity.
- Name the activity Invoice and select InvoiceID as Primary Key. Click next.
- Add the relationship between contacts and invoices.



- After applying it click next.
- Unify your customer activity data as shown in the image on the next page.

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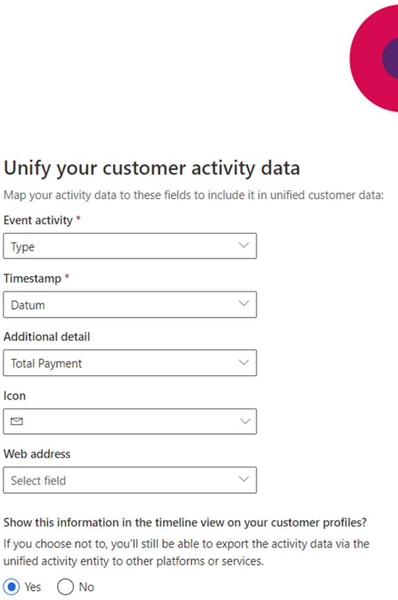
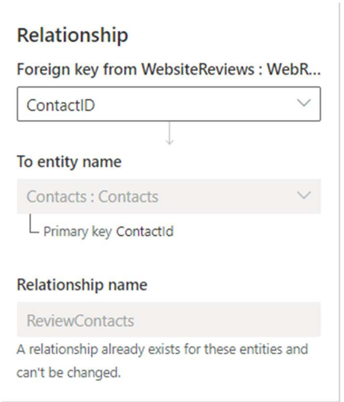


- Select Activity type 'Create new' and name it Invoice.

- Review and save the activity. Don't run it yet.

Task 3: Set up Review activity

- Click on add activity.
- Name the activity Review and select ReviewID as Primary Key. Click next.
- Add the relationship path.



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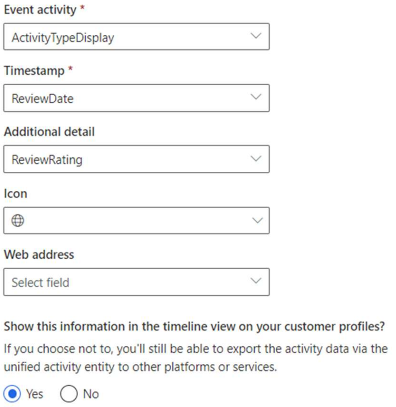
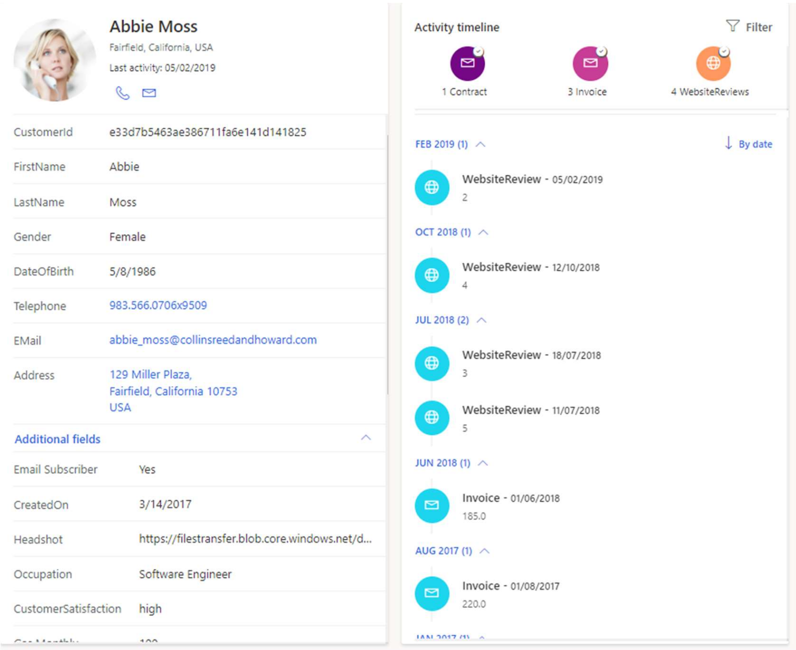
- Unify your customer activity data as shown in the image below.



- Click next and set the activity type to Feedback.
- Review and save the activity. Run the activities now.

Task 4: Take a look

Wait until the activities have loaded completely. Let's now take a look at Abbie Moss's profile again. It should look as follows:



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8. Building measures

Measures help you to better understand customer behaviors and business performance. They look at relevant values from unified profiles. For example, a business wants to see the total spend per customer to understand an individual customer's history.

Create measures on the level of individual customers (customer attribute, customer measure) or on the level of the business/organization (business measure). Customer attribute and customer measure enable you to track performance per customer. For example, the total spend by each customer. Business measures track performance per business. For example, the total revenue by the company.

Customer attribute: Generates output as a new attribute, which gets saved as a new column in the system-generated entity named Customer_Measure. When refreshing a customer attribute, all the other customer attributes in the Customer_Measure entity refresh simultaneously. In addition, customer attributes are shown in the customer profile card. Once run or saved, you can't change a customer attribute to a customer measure.

Customer measure: Generates output as its own entity and you can't change it to a customer attribute once run or saved. Customer measures don't show in the customer profile card.

Business measure: Generates output as its own entity and shows on the home page of your Customer Insights environment.

We'll only create customer attributes and one business measure. We want to know the lifetime value of a customer, the end date of their last contract, how much a customer has to pay extra per month when comparing their contract and the actual amount on their invoice and the NPS score giving by a certain customer as well as the average NPS for the entire business.

Task 1: Customer Lifetime Value

Met opmerkingen [DK9]: Maybe include that this would be a customer attribute?

- Go to Measures and click on 'New'. You'll want to select the 'Build your own' option.
- Name the measure 'Customer Lifetime Value'.
- Make sure the measure type is 'Customer level', this type should have been selected automatically.
- Select the 'Sum' function.
- Click on Add attribute and select 'Actual Total' from the Invoice entity.
- Make sure the measure you created matches the image on the next page.

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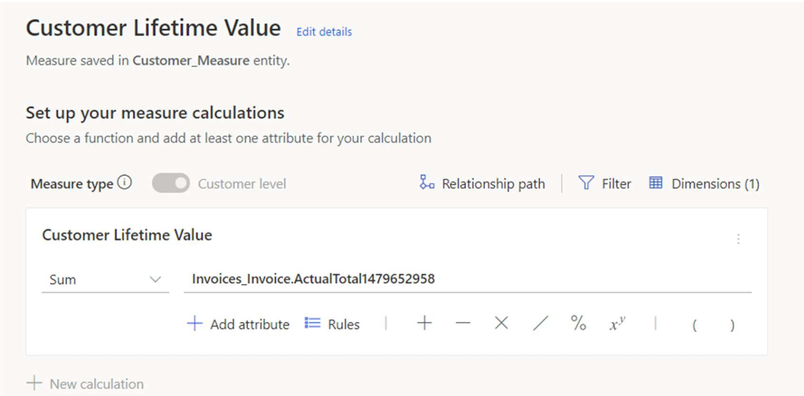
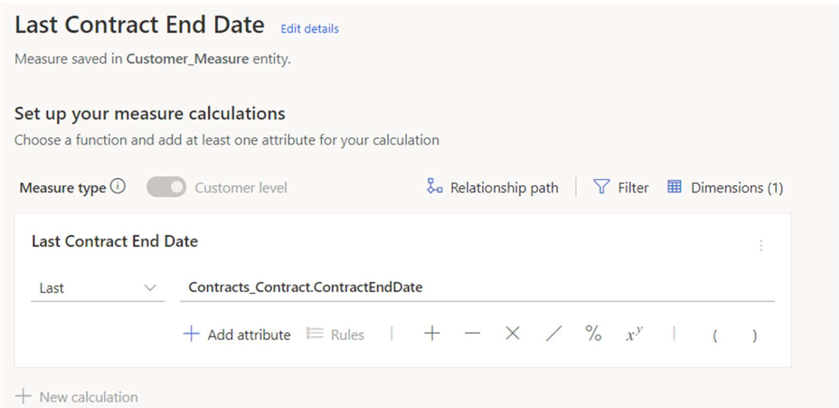


- Run the measure.

Task 2: Last Contract End Date

- Go to Measures and click on 'New'. You'll want to select the 'Build your own' option.
- Name the measure 'Last Contract End Date'.
- Make sure the measure type is 'Customer level', this type should have been selected automatically.
- Select the 'Last' function.
- Click on Add attribute and select 'ContractEndDate' from the Contract entity.
- Make sure the measure you created matches the image below.



- Run the measure.

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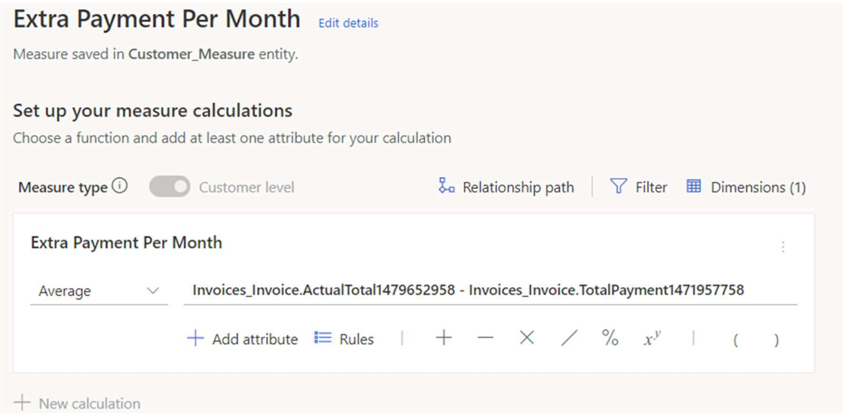
Task 3: Extra Payment Per Month

- Go to Measures and click on 'New'. You'll want to select the 'Build your own' option.
- Name the measure 'Extra Payment Per Month'.
- Make sure the measure type is 'Customer level', this type should have been selected automatically.
- Select the 'Average function.
- Click on Add attribute and select 'Actual Total' from the Invoice entity.
- Click on the Subtract (-) icon or type it manually next to the attribute.
- Click on Add attribute and select 'Total Payment' from the Invoice entity.
- Make sure the measure you created matches the image below.



- Run the measure.

Task 4: Customer NPS Score (1 to 10)

The reviews have a score from 1 to 5, however we want to have a NPS measure with scores from 1 to 10. As seen in the previous task it is possible to add calculations to a measure.

- Go to Measures and click on 'New'. You'll want to select the 'Build your own' option.
- Name the measure 'Customer NPS Score (1 to 10).
- Make sure the measure type is 'Customer level', this type should have been selected automatically.
- Select the 'Average function.
- Click on Add attribute and select ReviewRating from the WebsiteReviews entity.
- Click on the Multiply (x) icon or type * manually next to the attribute.
- Add a 2 next to the *.
- Make sure the measure you created matches the image on the next page.

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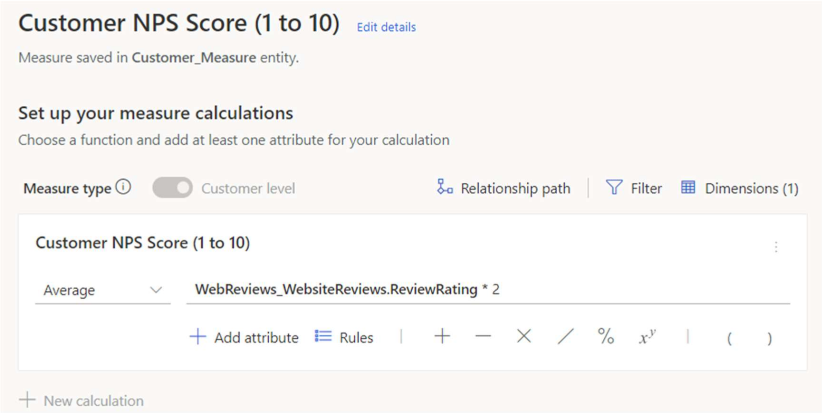
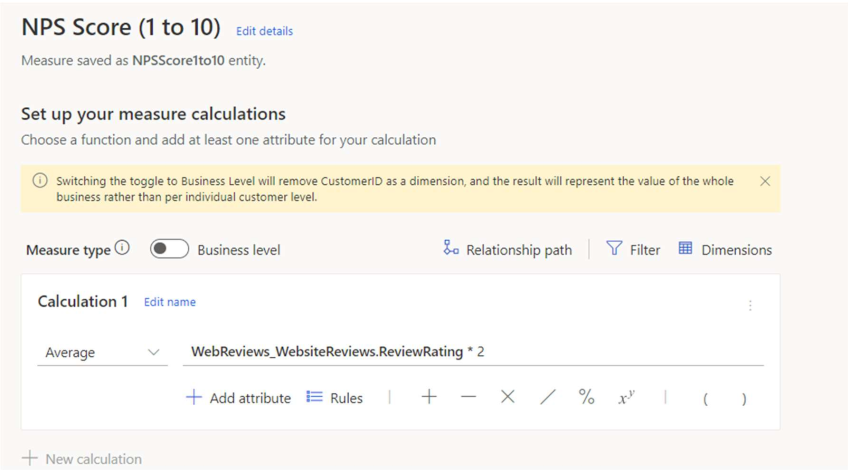


- Run the measure.

Task 5: NPS Score (1 to 10)

This measure matches the previous one for the most part. The only difference being the measure type. Set the measure type to 'Business level' by clicking on the toggle switch. You might see there is no Dimension selected anymore. The dimension in the previous measures was 'customer' so the measure can show up in the customer profile. This measure will only show up on the homepage. Match the measure to the image below before running it.



It might take some time for the measures to load completely. Wait until you don't see '0' values in Abbie Moss's profile anymore.

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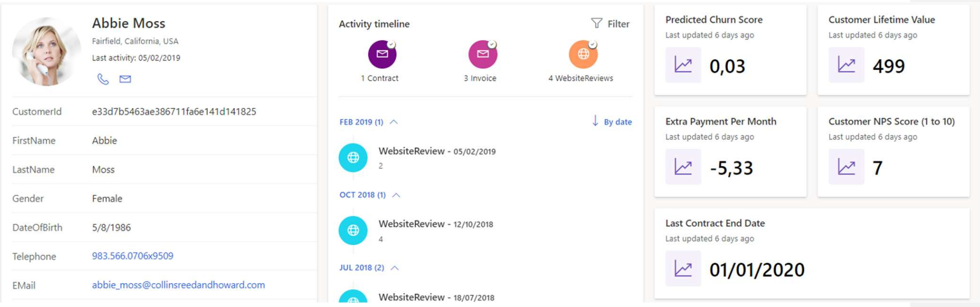
Task 6: Check out customer profile

As you can see the customer profile is starting to get filled with more information. This will help you when trying to create segments and providing insights on your customers.



You can also check out the business measure on the home page. You might see the home page is still quite empty. We'll be adding more to it in the next part 'Segmenting customers'.

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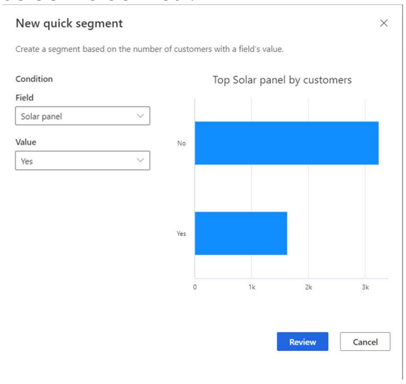
9. Segmenting customers

Segments let you 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.

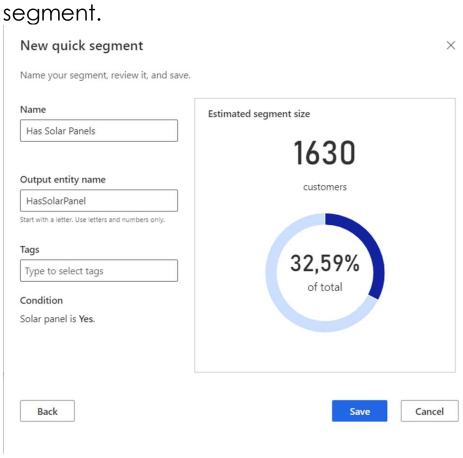
Customer profiles that match the filters of a segment definition are referred to as members of a segment. You'll see there are multiple ways to create segments such as from profile information, measures and completely from scratch. You can also request suggestions made with AI or get insights on overlap or differentiators between segments.

Task 1: Segment 'Has Solar Panels' from profiles

- Go to segments and click 'New'.
- Select 'Create from Profiles'.
- Select the 'Solar Panel' field.
- Select value 'Yes'.



- Click on Review and name the Segment 'Has Solar Panels' before saving the segment.



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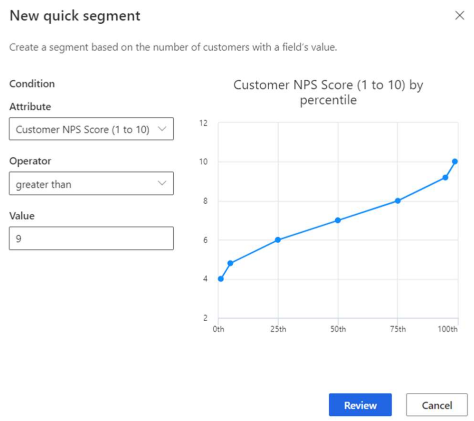
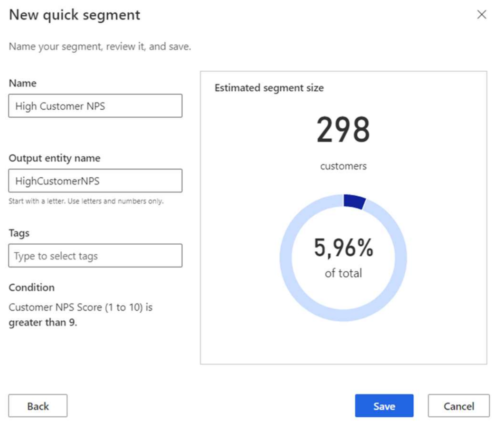
Task 2: Segments high and low customer NPS from measure

- Go to segments and click ‘New’.
- Select ‘Create from Measures’.
- Select the Customer NPS Score (1 to 10) attribute.
- Select the ‘greater than’ operator.
- Type in value ‘9’.

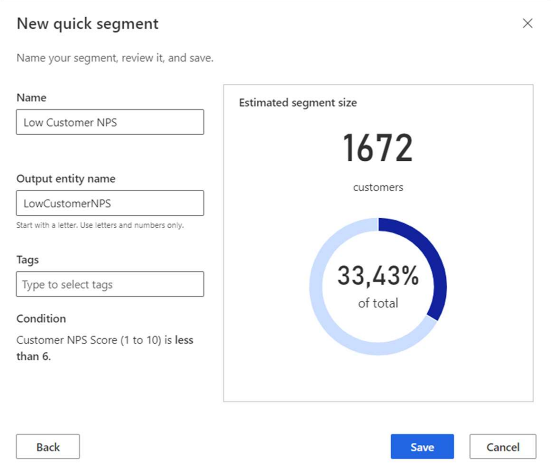


- Click on review and name the segment ‘High Customer NPS’ before saving the segment.



Move on to the next page to create a segment for low NPS scores as well.

- Go to segments and click 'New'.
- Select 'Create from Measures'.
- Select the Customer NPS Score (1 to 10) attribute.
- Select the 'less than' operator.
- Type in value '6'.
- Click on review and name the segment 'Low Customer NPS' before saving the segment.



Task 3: Build segment 'Owned Without Solar Panels'

This segment is more complicated than the previous one. We're making the assumption that only people who own their house would install solar panels. People owning a condo wouldn't be able to install Solar Panels either. We want to know who doesn't have solar panels but exclude the people that wouldn't be able to install them anyway. This way we target the right people when advertising the option of installing solar panels.

- Go to segments and click 'New'.
- Select 'Build your own'.
- Name the segment 'Owned Without Solar Panels'.
- Select the 'RentalOrOwned' attribute from the CBS entity and set the condition to 'RentalOrOwned is equal to Owned'.
- Click on Add condition and make sure 'Rule 1' uses 'and'.
- Select the 'Type_House' attribute from the CBS entity and set the condition to 'Type_House is not equal to Condo'.
- Click on Add condition and make sure 'Rule 1' uses 'and'.
- Select the 'Solar panel' attribute from the Customer entity and set the condition to 'Solar panel is equal to No'.

Met opmerkingen [DK10]: Sometimes it bugs and you have to add from the right side, from the list of fields

Met opmerkingen [SH11R10]: Haven't seen that yet nut if it does I'll explain on the spot

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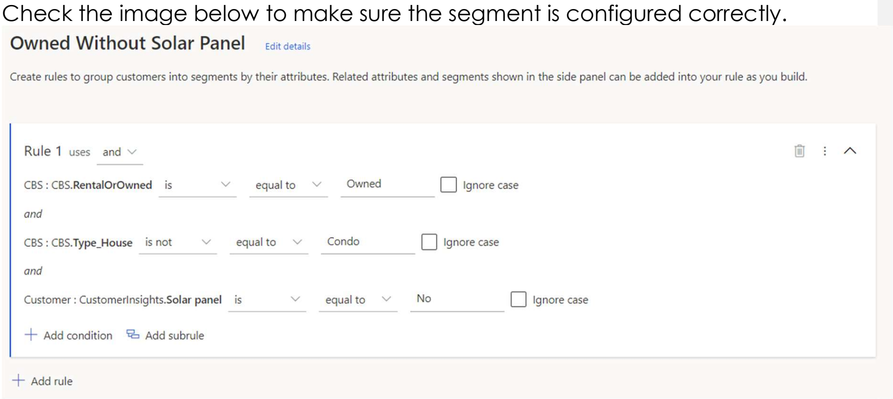
- Check the image below to make sure the segment is configured correctly.



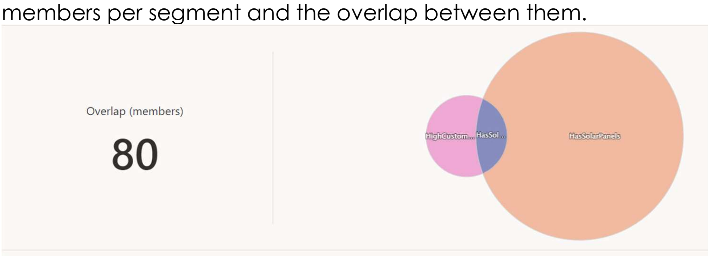
- Run the segment.

Task 4: Overlap Solar Panel and High Satisfaction

Let's see if there's any overlap between the 'Has Solar Panel' and 'High Customer NPS' segment. We'll have to go to the 'Insights' tab within Segments for this.

- Click on 'New'.
- Choose Insight Type 'Overlap'.
- Select the 'High Customer NPS' and 'Has Solar Panels' segment.
- Click Next and disable all attributes as they're optional before clicking Next again.
- Name the segment 'High NPS and Solar Panels' and save the segment.

Check out the segments on the homepage. Here you can see how many members are in a segment. Go back to segments and check out the Overlap Insight you created by clicking on it. Here you can see a Venn diagram and the amount of members per segment and the overlap between them.



Name ↑	Total Members	Percentage
HasSolarPanels	1630	90,6%
HighCustomerNPS1to10	250	13,9%
HighCustomerNPS1to10 + HasSolarPanels	80	4,4%

In the next part we'll be looking at the customer profile again. We'll be enriching it with external sources to figure out any interests a customer might have.

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10. Enriching customer profiles

Use Microsoft's proprietary data to enrich your customer data with interests/share of voice (SoV). This SoV is based on data from people with demographics similar to your customers. This information helps you to better understand and segment your customers based on SoV to specific brands and interests.

We use Microsoft's online search data to find affinities and SoV for brands and interests across various demographic segments (defined by age, gender, or location). The online search volume for a brand or interest forms the basis for determining the affinity or SoV. However, each provides a different perspective to understanding your customers.

Task 1: Add Interests to Customer Profile

- Go to Enrichment under the data tab.
- Click on Add enrichment and select the Interests option.
- Read the overview or click next right away.
- Enter the following interests manually
  - Power & Electricity Services
  - Environmentalism
  - Home Improvement & Maintenance
  - Wellness Therapy & Massage
  - Theme Parks
- Click next and make sure to include profiles with medium to very high affinity levels.
- Set the match precision to exact and aggregate before going to the next step.
- Make sure 'Customer' is selected as the customer dataset and click next.
- Set the Demographic by Gender and delete any other demographic attributes in the list.
- Select the Country, PostCode, City and State attribute to map the location and click next. These might be preselected in some cases.
- Give the enrichment a name before running the enrichment.

Met opmerkingen [DK12]: I am missing a step.
Either go Data->Enrichment
OR Customer->Profile addons-> Enrichment

Met opmerkingen [DK13]: They were preselected

Review

Review and save your choices below. Use edit links to revise specific sections.

Interests definition Edit
Country/Region: United States (English)
Interests: Power & Electricity Services, Environmentalism, Home Improvement & Maintenance, Wellness Therapy & Massage, Theme Parks

Preferences Edit
Interest affinity levels: Include profiles with Medium to Very high affinity levels.
Match precision: Exact and aggregate

Required data Edit
Type: Profiles
Name: Customer

Attribute mapping Edit
Gender: Gender
Country/Region: Country
ZIP/Postal Code: PostCode
City: City
State/Province: State

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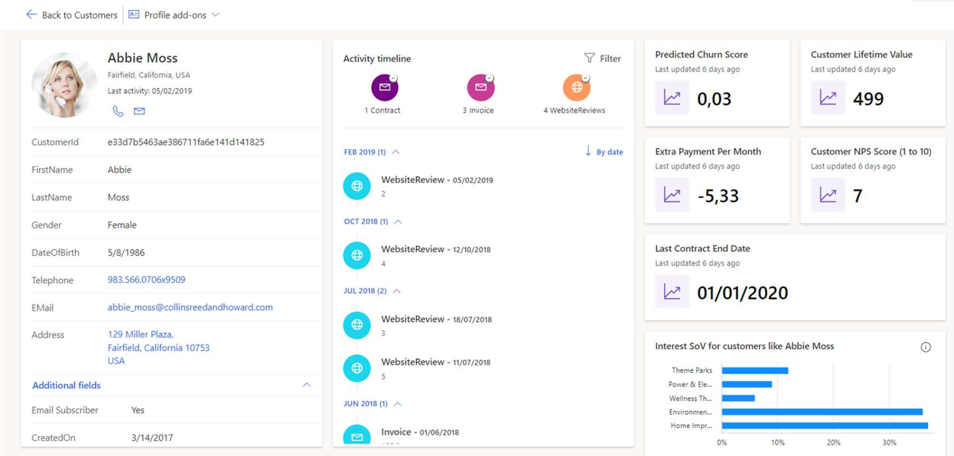
Task 2: Check the customer profile

You might have to wait a while before the enrichment shows up. You can take this time to experiment with segments or measures. Once it has loaded you'll see the interests in the corner of the customer profile. You'll see how many points a certain interest has for the selected customer which in this case would be Abbie Moss.



You have now completed the Customer Insights part of the workshop. Take the time to fully understand everything you did. You can also experiment with new measures and segments or anything we haven't covered in the course for as long as the trial environment lasts. In the next chapter we will be looking at a customer journey and create an email based on what we have created in Customer Insights

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11. Dynamics 365 Marketing

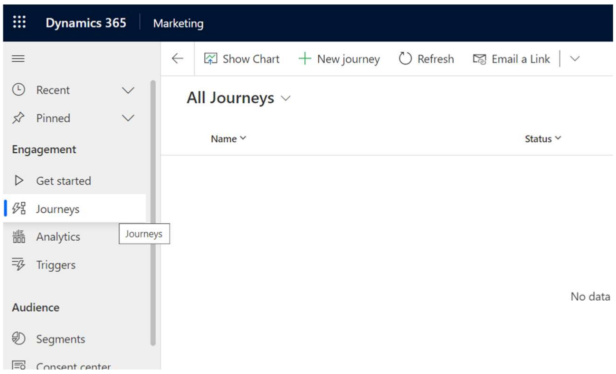
Before moving on to the Marketing environment we'll want to create a segment that works for our Customer Journey. We'll configure this journey to make sure customers who have already paid their entire bill don't get an email asking them to pay. On the other hand, customers who haven't paid yet are sent a reminder.

Task 1: Create a segment from measure (In Customer Insights)

- Go to segments and click 'New'.
- Select 'Create from Measures'.
- Select the 'Extra Payment Per Month' measure.
- Select the 'greater than' operator.
- Type in value '0'.
  Make sure to note that any value above 0 means a customer has to pay money to the company while any value below 0 means they'll have to get money back. This has to do with the way the calculation had been set up when creating the measure.
- Name the segment 'High Energy Usage'
- Run the segment and go to the Dynamics Marketing environment. Take a look at the environment before moving on to the next step.

Task 2: Create a journey (In Real Time Marketing)

- Take a look at 'Segments' under Audience to see the segment you exported.
- Go to 'Journeys' under Engagement and select 'New journey'.



- Give the journey a name.
- Click 'Segment-based' so we can use the segment we exported in Customer Insights. Select the segment in the next field.
- As we want to make sure the monthly extra payments are processed per year set the frequency to repeat every 12 months. At last set a start and end date. Look at the next page to see what these settings look like.

Met opmerkingen [SH14]: Aanpassen als connectie naar behoren werkt

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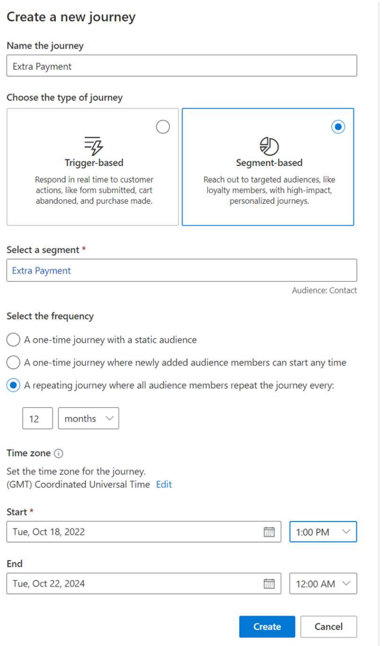
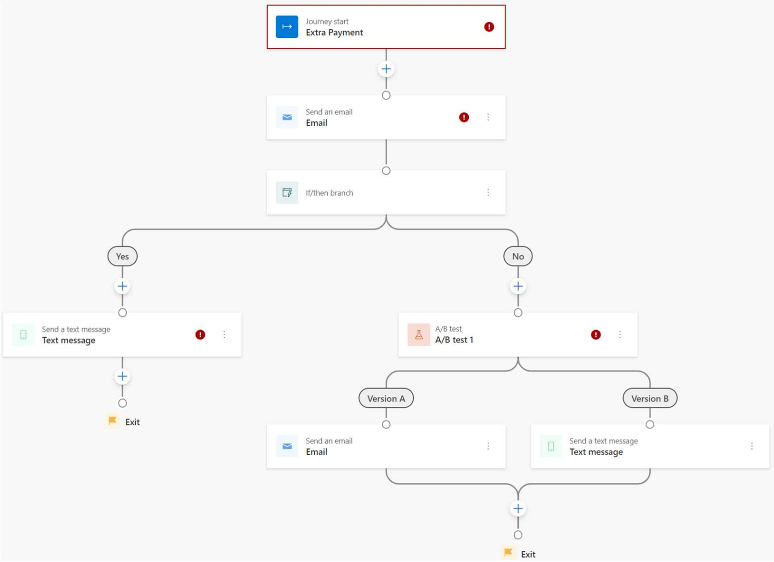


- Click on ‘Create’.

Task 3: Configure Journey

- Use the + button to add items to the journey. Copy the image below as the base.
- 

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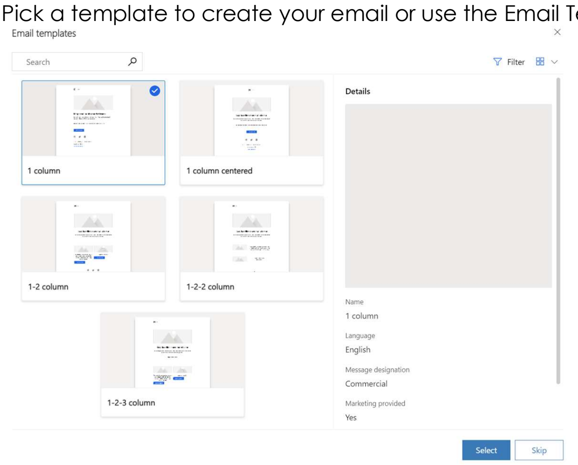
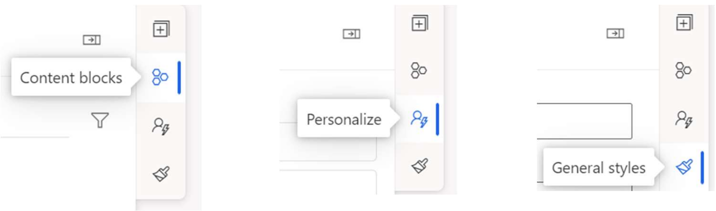
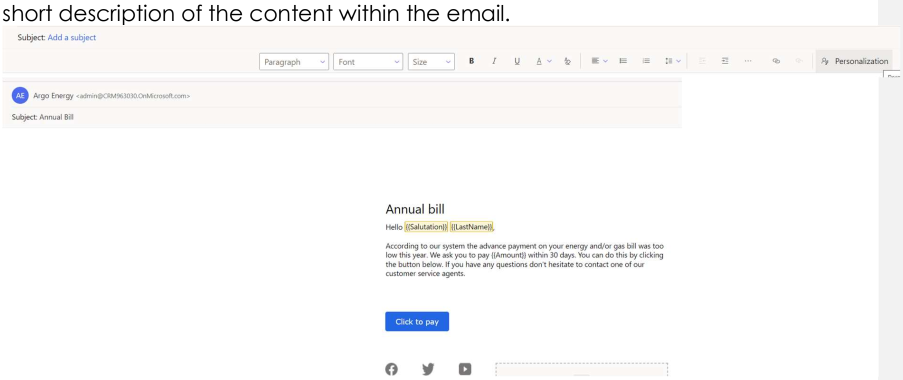
- Create an Email by clicking on the first block and clicking on the field under 'Select email' this will give you the option to create a new email.
- Pick a template to create your email or use the Email Template.txt.



- You can now create an email with help of the template or make it from scratch. When using a fully configured environment you could also use 'Content blocks' which help you create good looking emails faster. You can find this in the menu on the right. The same goes for personalised content such as customer names and general styling of the email.



- To personalize content within the email you can also use the top bar. Clicking on add a subject will give you the option to give the email a subject as well as a short description of the content within the email.



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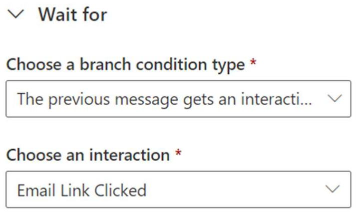
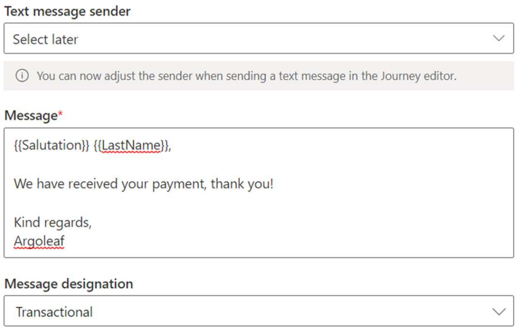
- After clicking ‘Ready to send’ move on to the if/then branch and set it up as follows to make sure we can set a reminder if a customer hasn’t paid within 30 days.



- When the email button has been clicked the customer will move on to the ‘yes’ branch. They will get a text message thanking them. Create this text message by clicking on new text message. As you can see you can also personalise these.



- Move on to the ‘no’ branch and configure you’re A/B test to figure out if sending a reminder is more effective through text or email. You can select the email you already created or create a new one.
- Create a new text message containing a reminder to pay. Try using the personalization options.
- You might notice a red icon next to your text message blocks. This has to do with the fact that we don’t have a configured phone number from which to send the texts. This means we can’t officially publish the journey.

On the next page you can see an image of the journey as it’s supposed to look if you followed the steps in this task.

This is the end of the Angroleaf lab
For questions please reach out to us on: info@intouch365.nl

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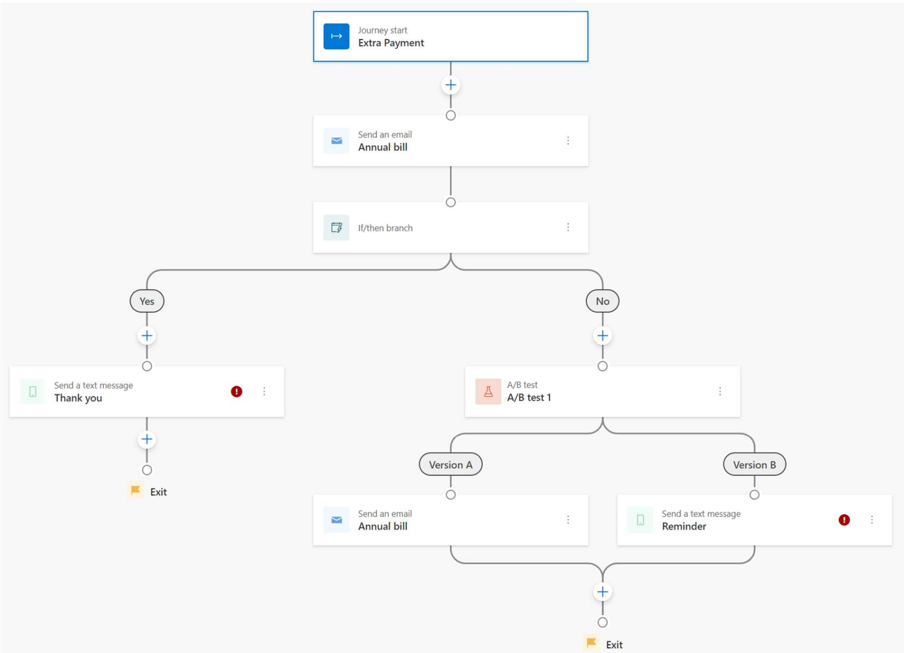

This is the end of the workshop. You can experiment some more with creating journeys, emails and text messages as well as any other functionalities within the Dynamics 365 Marketing environment. An example would be to experiment with creating a simple trigger and make a journey based on that. Have fun experimenting!

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