

Deliver end-to-end  
experiences across the  
entire customer lifecycle



# Digitally transformed customer experiences – the elusive differentiator

Even though

**86%**

of buyers will pay more for a better customer experience

Only

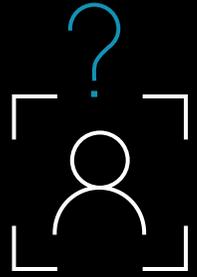
**1%**

of customers feel that companies consistently meet their expectations

**Because...**



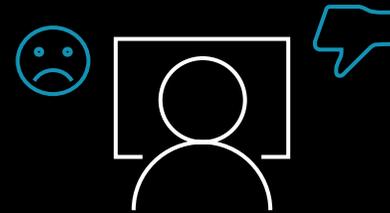
# Customer experiences are still disjointed



Companies don't know their customers in an **actionable way**



Digital and physical experiences are **disconnected**

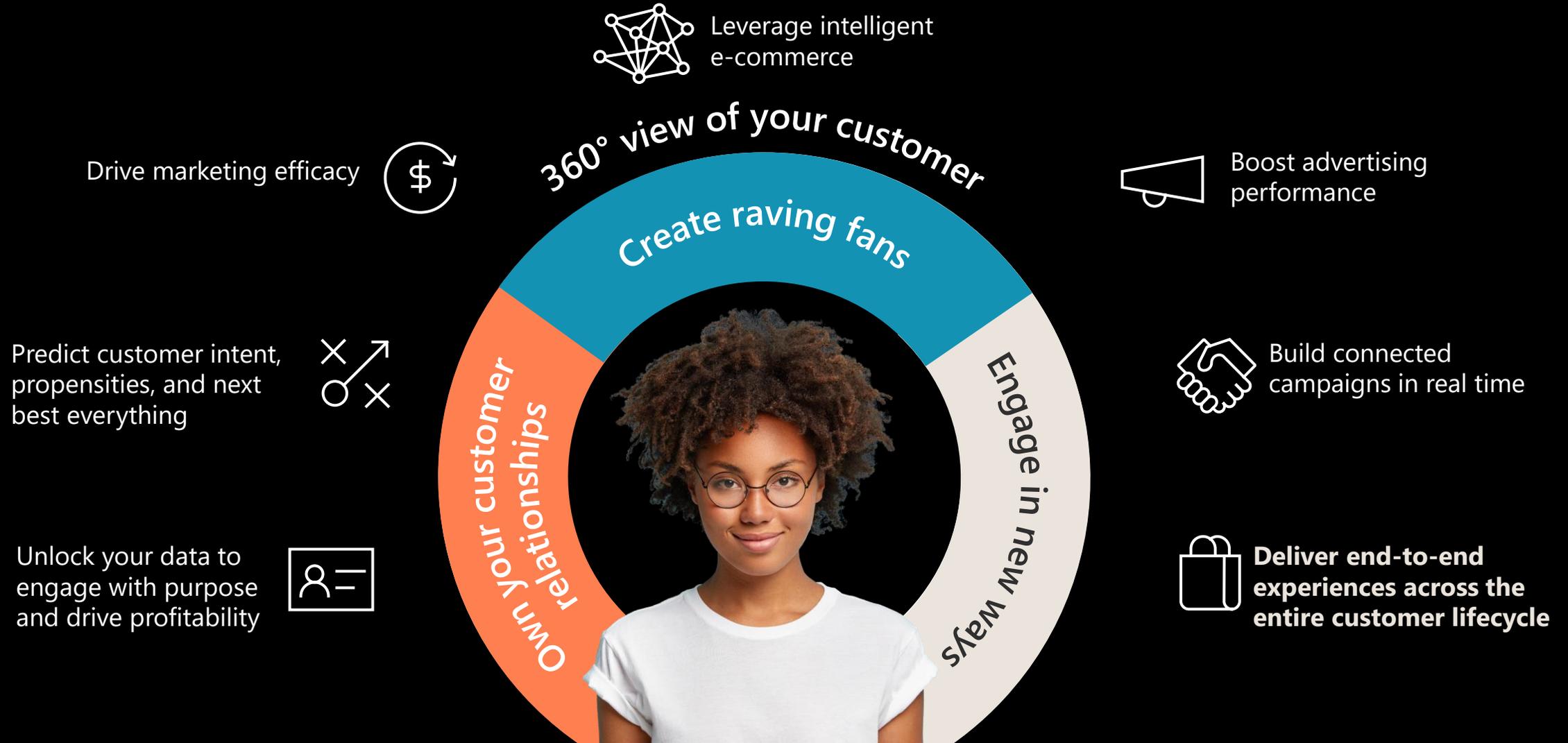


Inability to engage in **moments that matter**

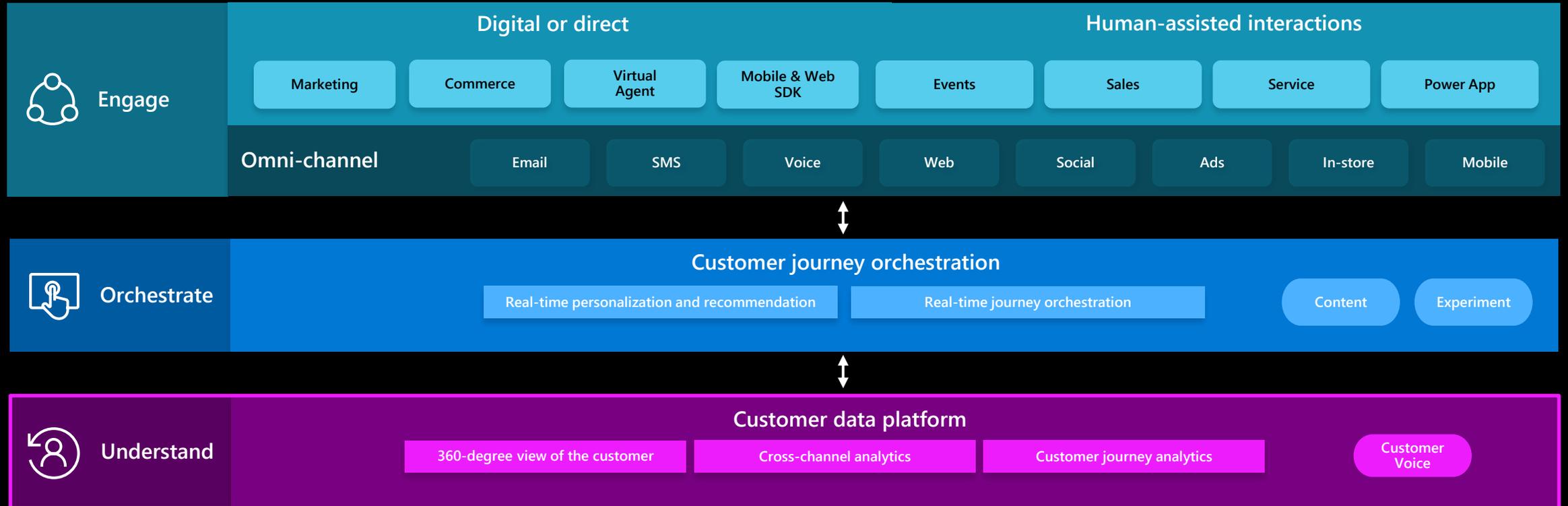


Multiple departments are creating **siloed experiences**

# A complete marketing solution



# A complete marketing solution



## Leverage

AI-powered segments and insights for 1:1 hyper-personalized experiences



## Respond

In moments that matter with real-time, event-based orchestration



## Activate

End-to-end experiences across all customer touchpoints



## Self-learn

Data and AI-driven, self-learning and next best action optimization

# Personas



## Cameron

### Marketing maven

Cameron has been working for Contoso for 4 years. For her job, she relies on MarTech to optimize customer experiences and run effective and efficient campaigns.

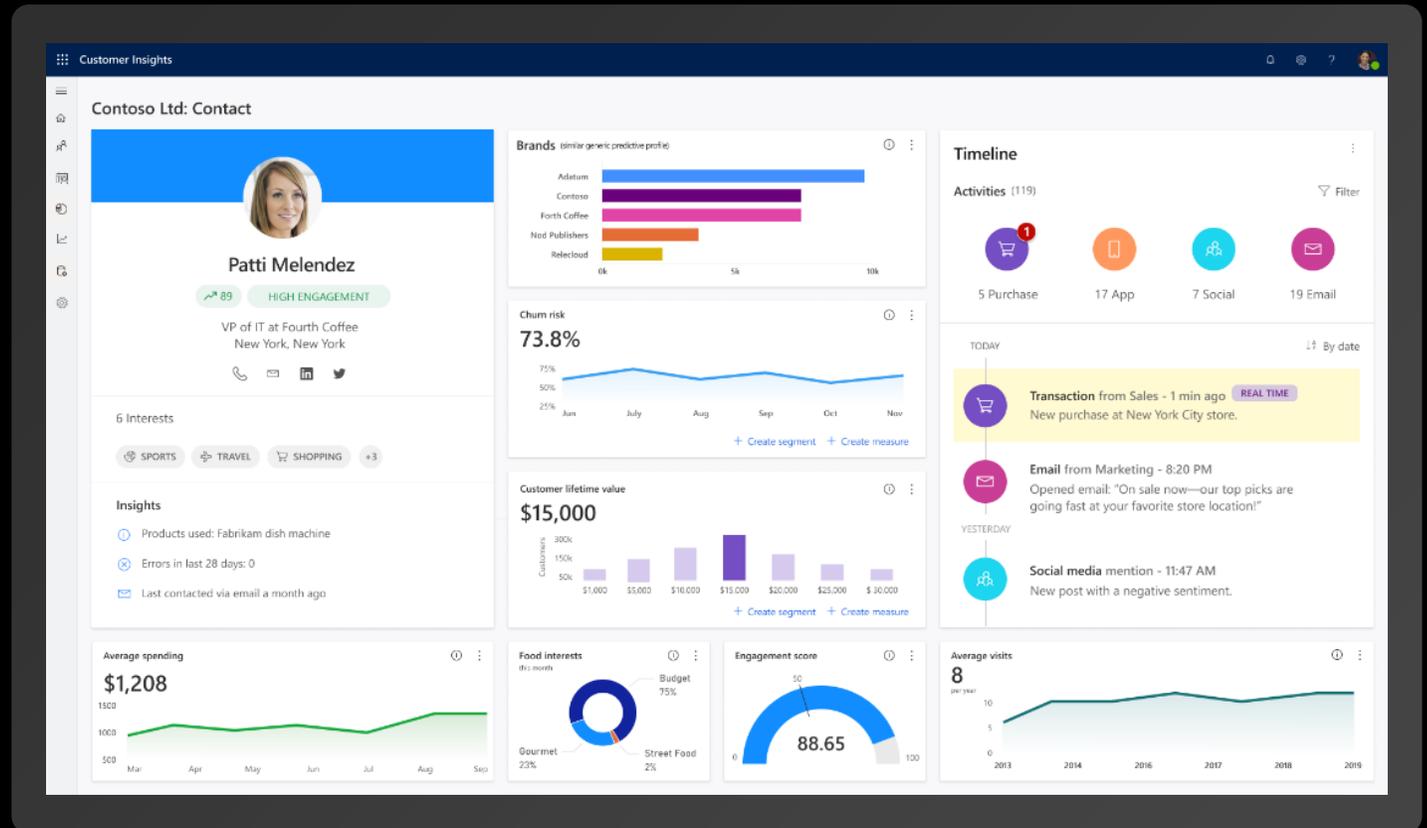


## Victor

### Data wrangler

Victor ensures the business teams at Contoso have the appropriate data to make informed business decisions and operate in a rapidly changing environment.

# Understand your customers





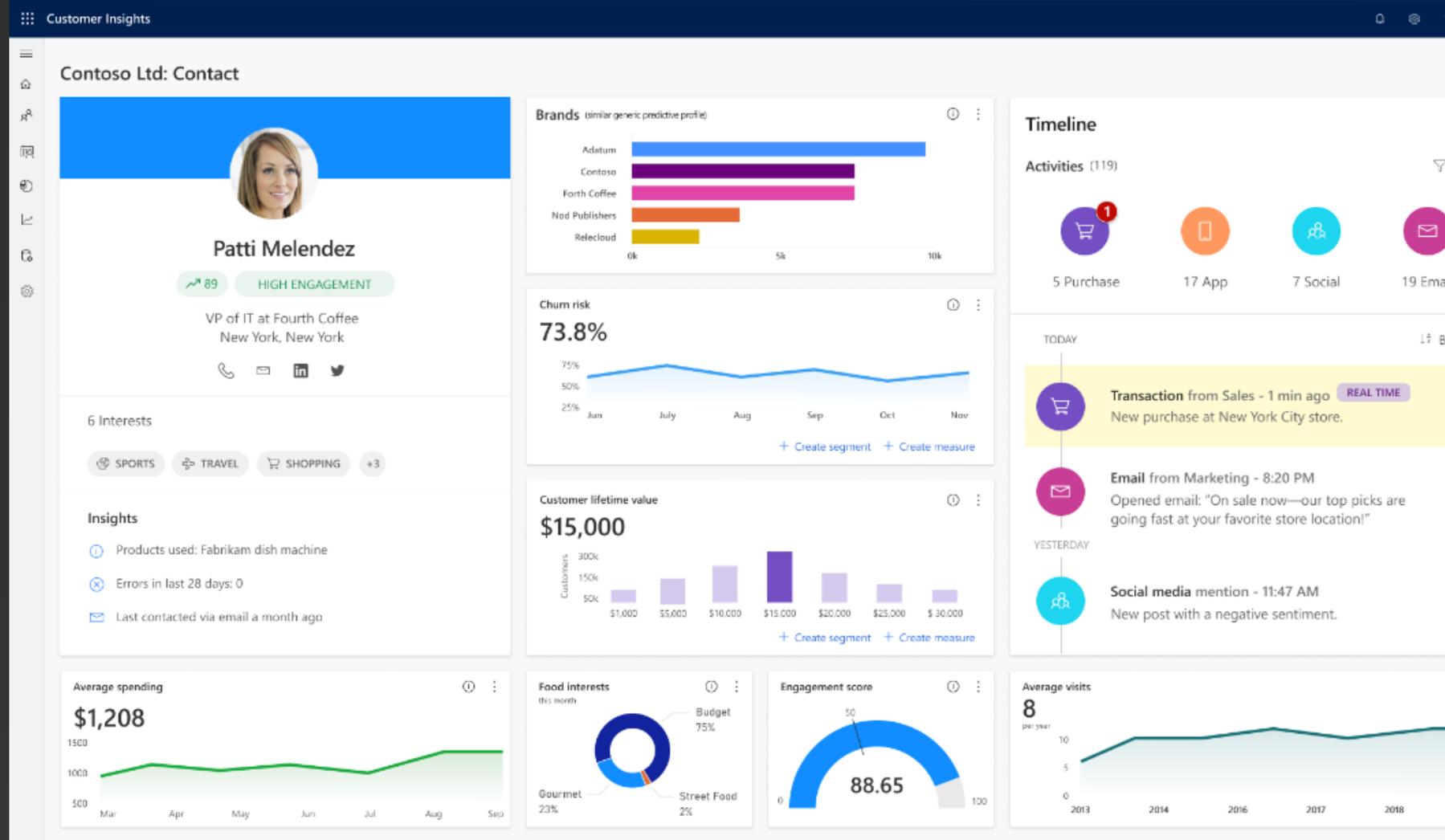
# Understand

360-degree view of the customer

AI-generated segments

Pre-built AI models

Analyze business



**Cameron**  
Marketing maven

Cameron can deeply understand her customers and gain a comprehensive view across touchpoints—including transactions, campaign responses, in-store or web visits, mobile app, loyalty redemptions, customer service encounters, social interactions, sentiment, or IoT signals. With Dynamics 365 Customer Insights, Victor can import the data or connect to an online service using pre-built connectors for myriad first- and third-party data sources to create this view for Cameron.



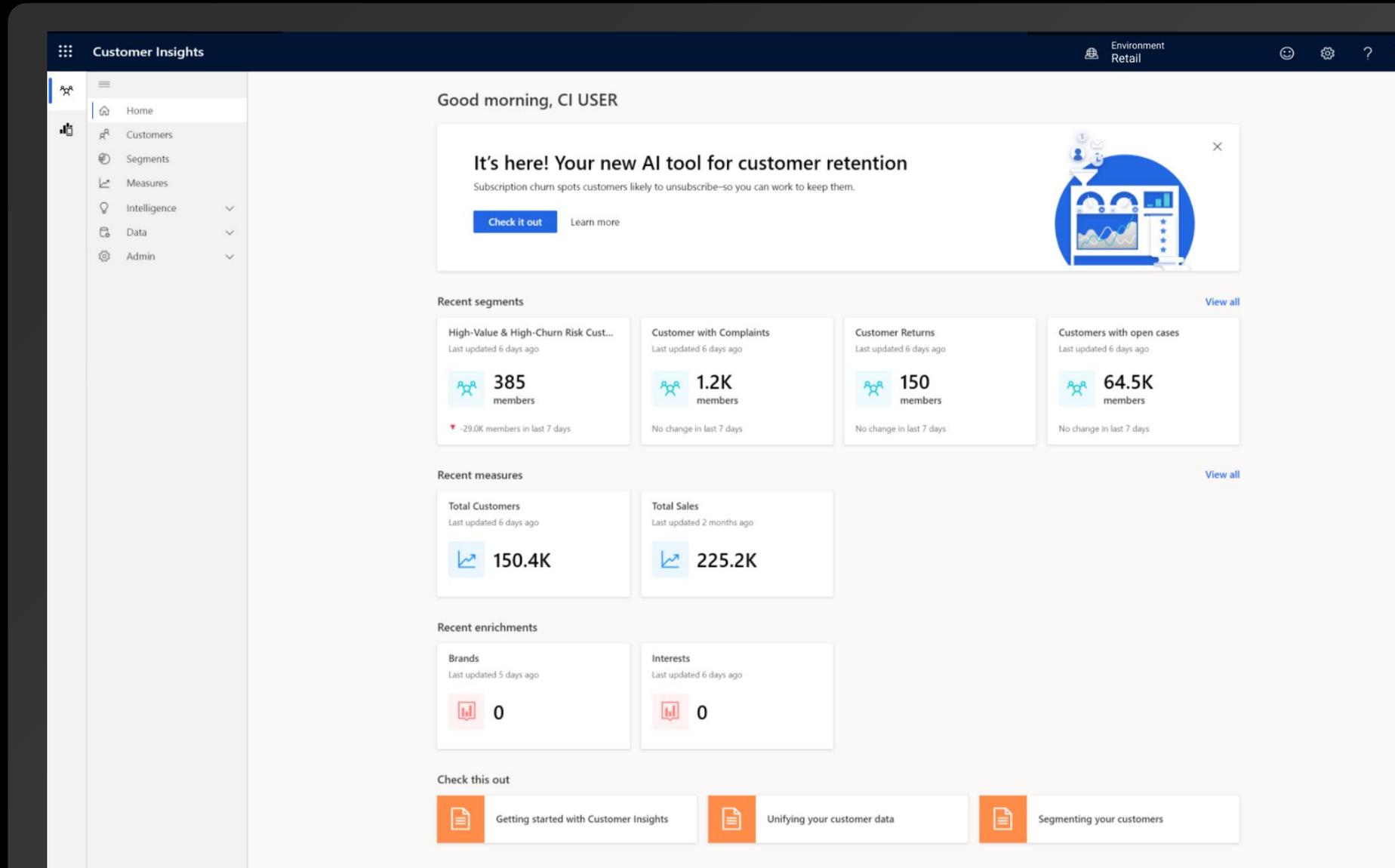
# Understand

360-degree view of the customer

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**Victor**  
Data Wrangler

Victor can precisely identify the audience for his campaigns by leveraging AI-generated segments that are based on attributes such as recency, frequency, and monetization. These segments from Dynamics 365 Customer Insights are imported directly in Dynamics 365 Marketing to make campaigns more effective or for fine-grained targeting in event-driven customer journeys.



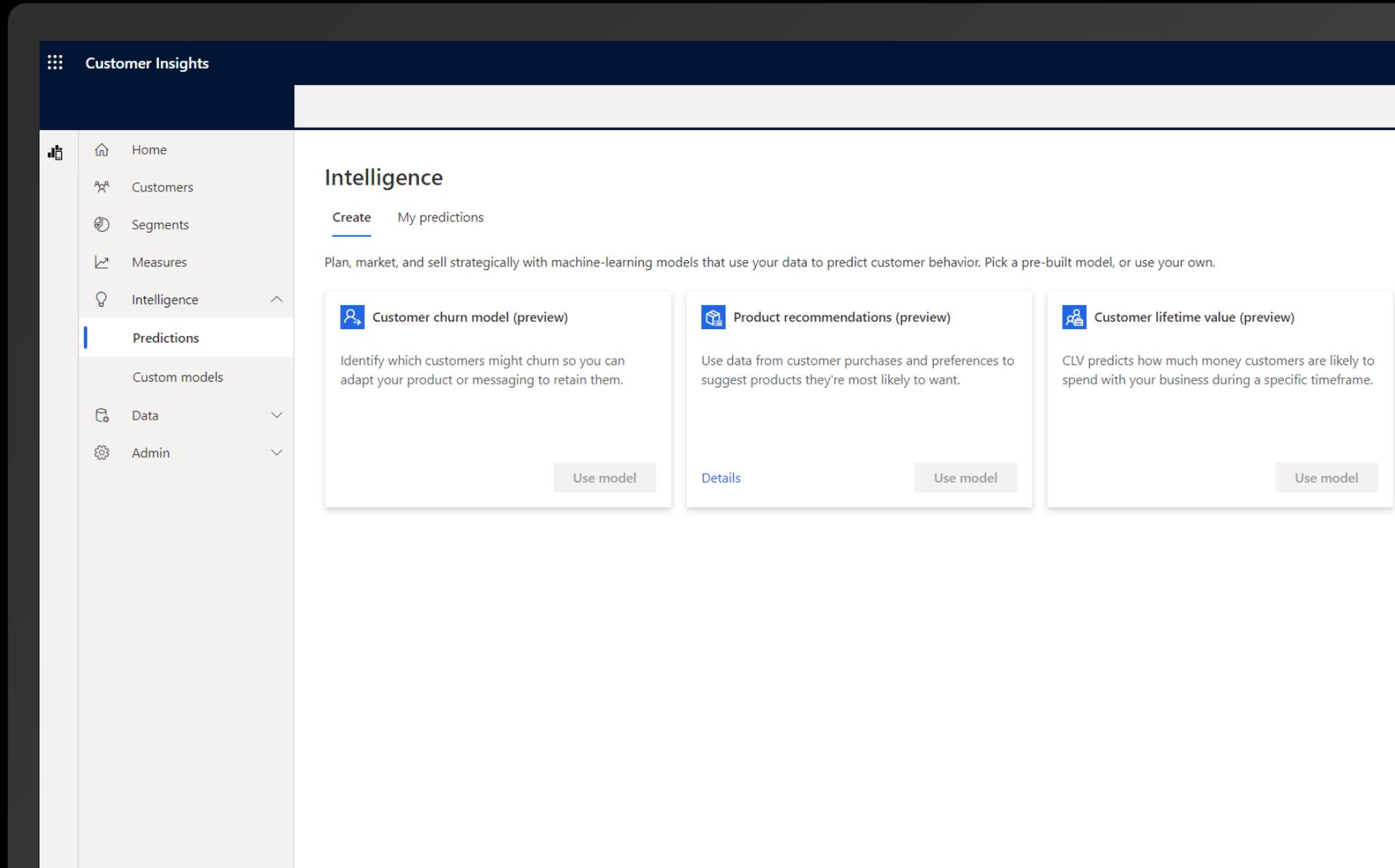
# Understand

360-degree view of the customer

AI-generated segments

Pre-built AI models

Analyze business



**Cameron**  
Marketing maven

Cameron can leverage ready-to-use AI templates and out-of-the-box predictions to easily predict customer lifetime value, transactional and subscription churn, and to recommended the right next best products and services. She also has access to the explanations behind the predictions.



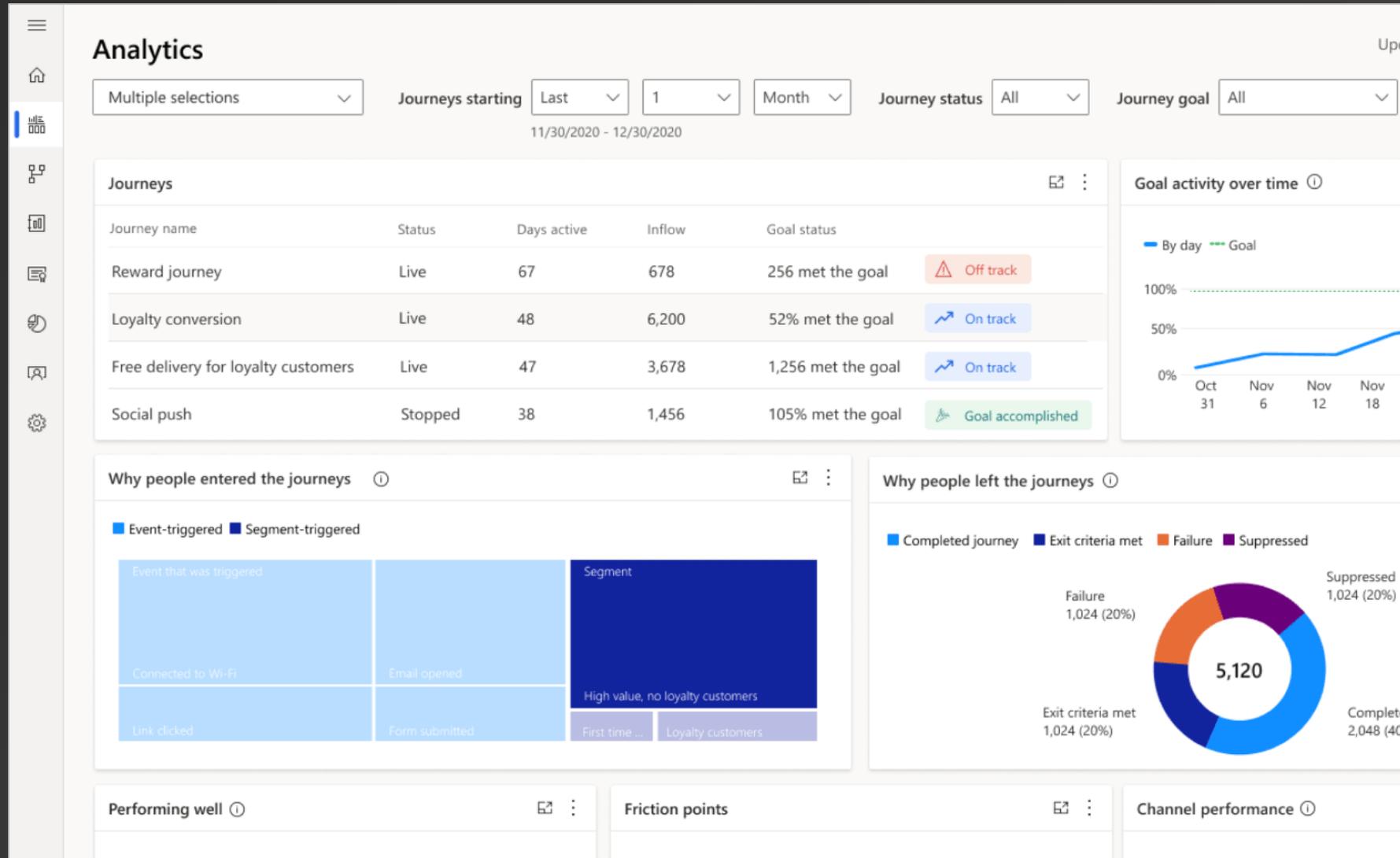
# Understand

360-degree view of the customer

AI-generated segments

Pre-built AI models

Analyze business



**Victor**  
Data Wrangler

Victor can evaluate the effectiveness of customer journeys with real-time analytics updates. He utilizes the built-in charts to highlight the flow density of journey participants through each step, analyzes channel performance using the deliverability funnel and *undelivered category pie chart* breakdown, and monitors goal accomplishment using the *goal attainment* chart.

# Orchestrate journeys in real time

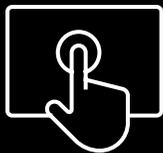
The screenshot displays the Dynamics 365 Marketing interface for an "In-store customer engagement journey" which is currently "Live". The top right corner shows "Inflow: 4,100" and "Goal met: 82%", with a "Stop" button.

The central flowchart illustrates the journey process:

- Trigger event:** "Connect to in-store Wi-Fi" (4,100 contacts)
- Decision:** "Add an if/then branch: Loyalty member" (4,100 contacts)
- Yes branch (2,700 contacts):**
  - Decision:** "Add an A/B test: Offer experiment" (2,700 contacts)
  - Version A (1,350 contacts):** "In-store exclusive offer"
  - Version B (1,350 contacts):** "Recommendations just for you"
- No branch (1,400 contacts):**
  - Decision:** "Optimize across channels: Best channel to communicate" (1,400 contacts)
  - Outcomes:** "500 loyalty points with sign-up" (980 contacts) and "500 loyalty points with sign-up" (420 contacts)

The right-hand panel provides additional details:

- Journey:** Analytics and Properties tabs.
- Goal:** "The goal here is to improve in-store customer engagement. The goal is met when 100% of the customer participate in the promotion."
- Contacts reached the goal:** A gauge chart showing 82% completion (1,680 contacts) out of a total of 4,100.



# Orchestrate

Real-time journey orchestration

AI-led channel recommendation

AI-powered next best content

Collaborate without leaving the flow

A/B Testing



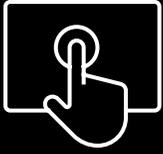
**Cameron**  
Marketing maven

Cameron can engage customers in *moments that matter* with event-based customer journey orchestration. The real-time nature of the journey enables Cameron to respond to the customers immediately and convert their expression of interest into a sale.

The screenshot displays the Dynamics 365 Marketing interface. The main header shows 'Dynamics 365 | Marketing' and the current view is 'In-store customer engagement journey' with a 'Live' status. A sidebar on the left contains navigation options: Home, Recent, Pinned, Customer Experience Platform, Journeys, Analytics, Events, Audience, Segments, Channels, Email, Push, Text messages, and Assets. A 'Create a new journey' dialog box is open, providing instructions: 'Create automated customer journeys to engage your target audience and nurture existing relationships with responsive, personalized messaging.' The dialog includes the following fields and options:

- What triggers the start of this journey?**: Radio buttons for 'An event' (selected) and 'A date'.
- Which event?**: A dropdown menu labeled 'Select event'.
- What's your general goal?**: A dropdown menu labeled 'Select goal'.
- Audience re-eligibility interval**: Radio buttons for 'Immediately' (selected), 'Never', and 'After' (with a 'Days' dropdown).
- Create this journey**: A blue button at the bottom.

In the background, a journey map is visible, showing a flow with a decision point 'No' leading to '1,400' and a subsequent step 'Optimize across channels' leading to 'Best channel to communicate' and '420'. Other elements include 'points with sign-up' and '500 loyalty points with sign-up'.



# Orchestrate

Real-time journey orchestration

AI-led channel recommendation

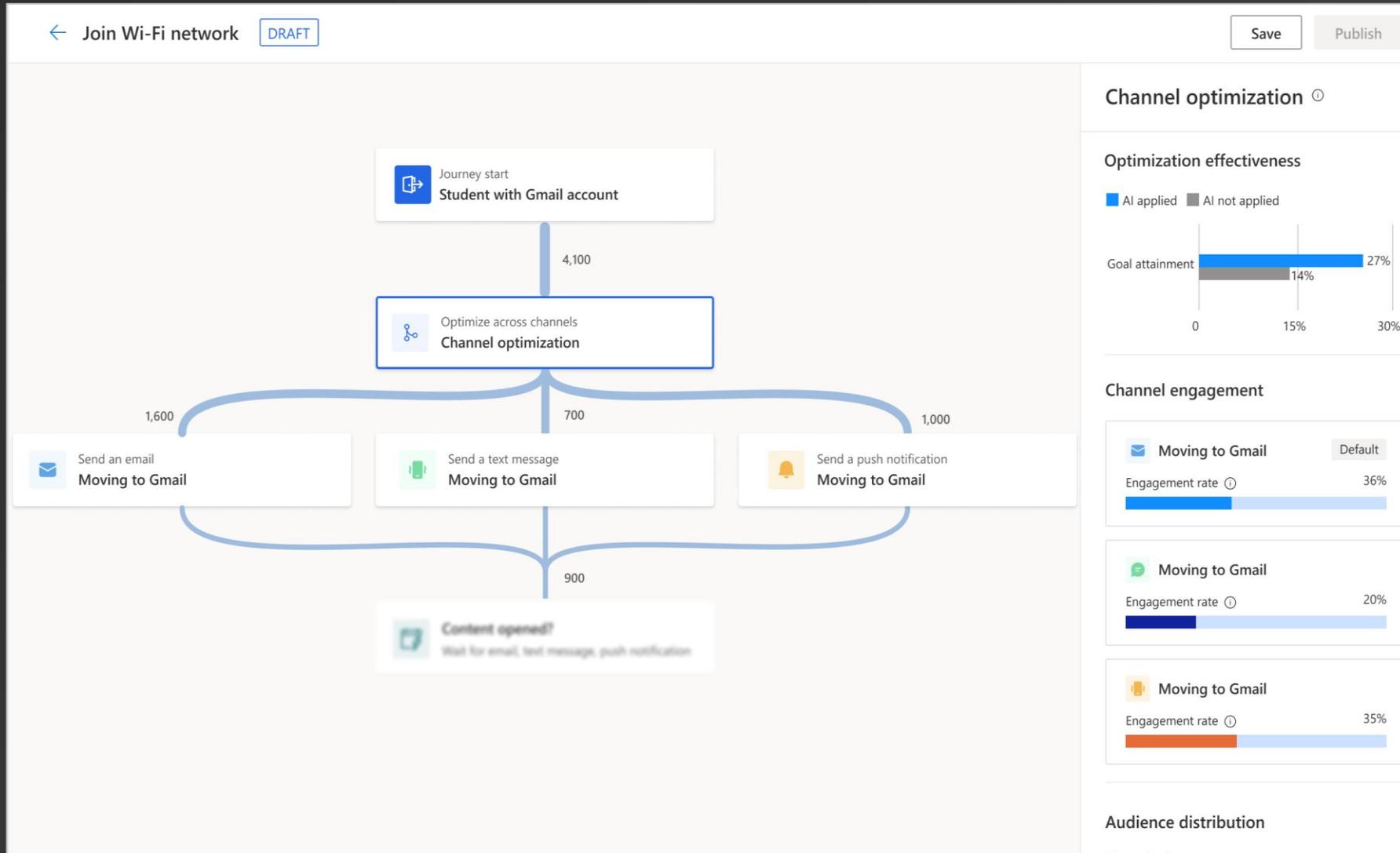
AI-powered next best content

Collaborate without leaving the flow

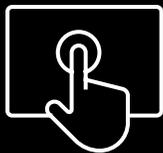
A/B Testing



**Cameron**  
Marketing maven



Cameron can leverage AI-driven channel optimization to select the *right channel* and the *right message* for each customer, at every step in their customer journey, without having to make a design-time choice or define a complex set of conditions. By continuously learning from the way customers engage with marketing campaigns, Cameron can optimize the journey to maximize the number of customers that reach the intended goal.



# Orchestrate

Real-time journey orchestration

AI-led channel recommendation

AI-powered next best content

Collaborate without leaving the flow

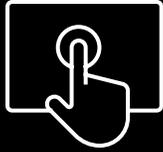
A/B Testing



**Cameron**  
Marketing maven

Compelling content and personalized offers are a marketer's most powerful tool in engaging customers or preventing them from churning. Cameron can build customer-centric journeys with the help of AI-powered next best content.

The screenshot displays the Dynamics 365 Marketing interface for editing a "Marketing email 1" draft. The interface includes a top navigation bar with "Dynamics 365" and "Marketing" tabs, and a right-hand sidebar with utility icons. The main content area shows the email design, which includes a header with the sender "Kristin Watson" and a subject line "Add a subject". The main body features a large image of a wine glass in front of a vineyard, with the "Centoso Winery" logo above it. Below the image is a footer with copyright information and links for "Unsubscribe" and "Manage preferences". The right-hand sidebar is titled "Edit dynamic image" and shows two variants: "Default" (Yard.png) and "VIP Member" (WineSet1.png), each with an "Edit" button. A "Ready to send" button is visible in the top right corner.



# Orchestrate

Real-time journey orchestration

AI-led channel recommendation

AI-powered next best content

Collaborate without leaving the flow

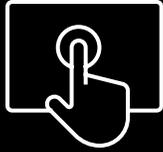
A/B Testing



**Cameron**  
Marketing maven

The screenshot displays the Dynamics 365 Marketing interface. The top navigation bar includes 'Dynamics 365 Marketing' and a search bar. The main content area shows an email draft titled 'Shipping confirmation' in 'Draft' status. The email body features a header for 'Centosa Winery' with the text 'Happy September, {{first name}}!' and a section titled 'Upcoming shipment' with a personalized message. A 'Toolbox' on the right side offers options for 'Text', 'Image', and 'Button' elements. A chat window titled 'Winter Sale' is overlaid on the right, showing a conversation about a banner approval. The left sidebar contains navigation options for 'Home', 'Recent', 'Pinned', 'Customer engagement', 'Audience', 'Channels', and 'Assets'.

Cameron can easily collaborate with her team without leaving the flow, enabling everyone to have the same context, helping her to focus and create the highest impact journeys, emails and other content more efficiently.



# Orchestrate

Real-time journey orchestration

AI-led channel recommendation

AI-powered next best content

Collaborate without leaving the flow

A/B Testing



**Cameron**  
Marketing maven

Dynamics 365 | Marketing

Read-only This record's status: Live

### Charity - Water Fundraiser Followup LIVE

200 Total inflow | 11% Goal met

1 day

A/B test Charity reminder email RUNNING

81 Version A | 119 Version B

Send an email Charity: water donation reminder | Send an email Charity:water existing donor email

200

If/then branch Specified event from any channel

114 Yes | 55 No

If/then branch Donation\_1

Channel optimization Send reminder communication

26 Send a push notification PN\_0208 | 29 Send a text message Charity:water reminder

47 Yes | 47 No

Wait 1 day

70% Reset

#### Channel optimization

Analytics Properties

#### Optimization effectiveness

AI-driven AI not used

Goal attainment 0%

#### Channel engagement

Charity:water reminder Engagement rate

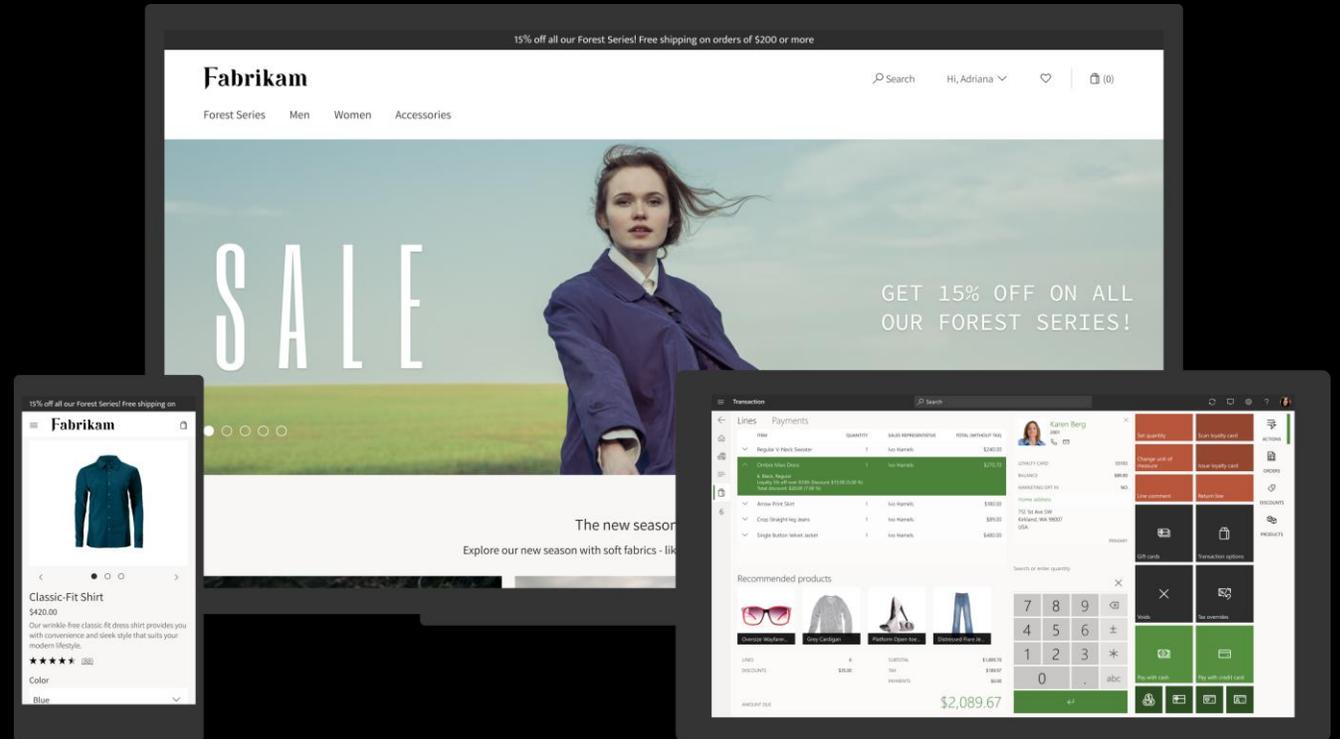
PN\_0208 Engagement rate

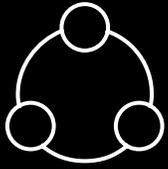
#### Audience distribution

AI applied | AI not applied by setting

Cameron can optimize customer journeys by creating A/B tests with the same message across different channels, different messages altogether, or any next action. With the new set of A/B testing tools, Cameron can confidently deliver the most engaging messages through the best channels and increase the ROI of every journey.

# Engage at every touchpoint





# Engage

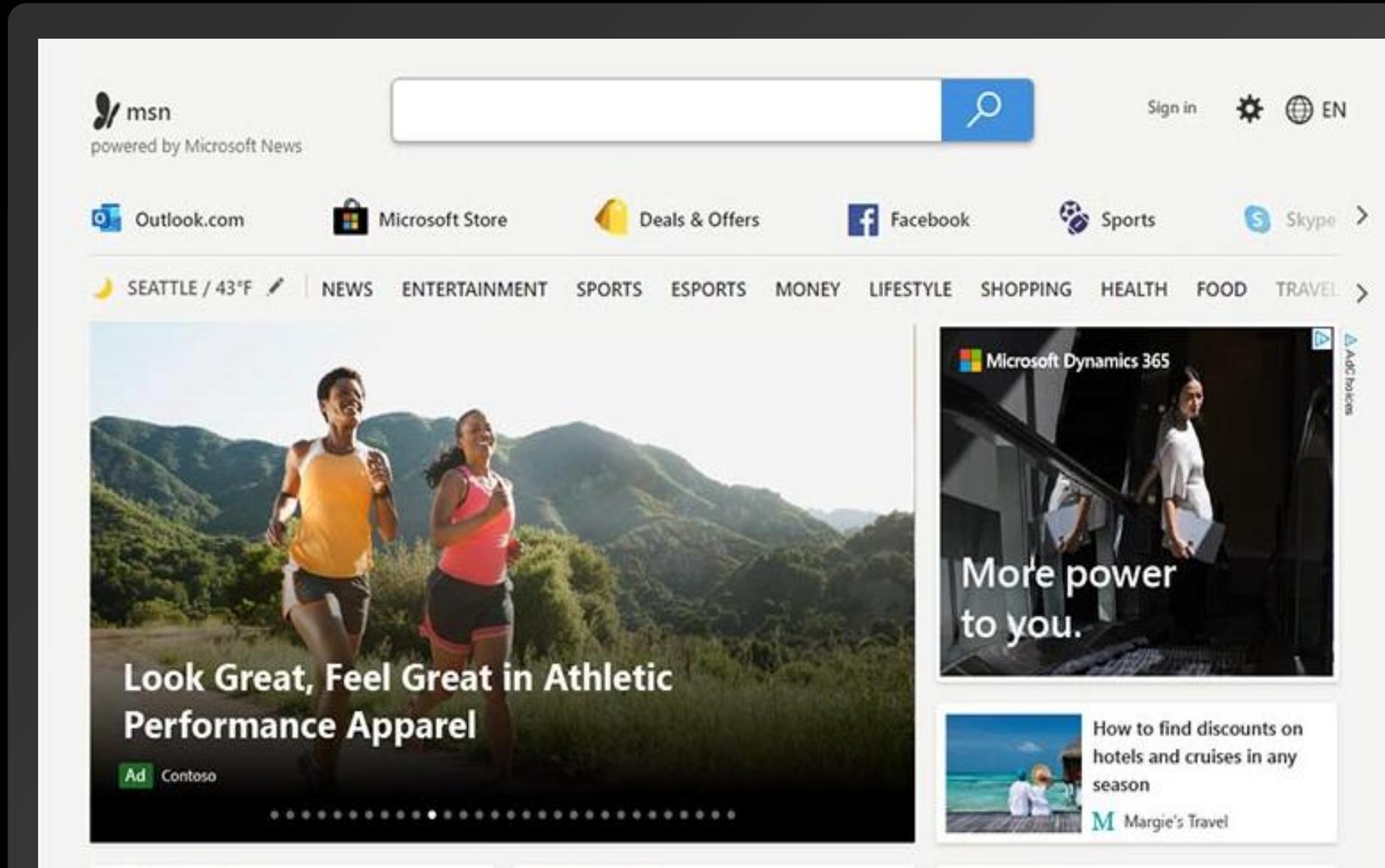
Boost advertising performance

Unify commerce

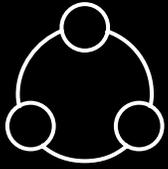
Activate across every touchpoint



**Cameron**  
Marketing maven



With a reach to over a billion people through engaging native and search ads, Microsoft Advertising is a great place for Cameron to drive broad upper funnel presence and attract new high-value customers. Cameron can set up a special set of creatives for high-value customers to curate and promote specific offers only for them.



# Engage

Boost advertising performance

Unify commerce

Activate across every touchpoint



**Cameron**  
Marketing maven

Cameron can give her customers the option to purchase when, how, and where they want—on any device—by delivering a frictionless and consistent engagement across online and offline channels. Leveraging AI-driven recommendations, Cameron can improve cross-selling and increase basket of goods.

15% off all our Forest Series! Free shipping on orders of \$200 or more

## Fabrikam

Forest Series Men Women Accessories

Search Hi, Adriana (0)

Women / Sweaters / [Knit Striped Turtleneck Sweater](#) / Shop similar looks

Category —

- Accessories (22)
- Shirts (13)
- Sweaters (35)
- Dresses (12)

Price —

\$5.00 — \$275.00

Color —

- Black (22)
- Gray (13)
- Red (35)
- White (12)



### Similar looks to

## Knit Striped Turtleneck Sweater

Black, Merino Wool

Results: **82** products

Results: **Relevance**



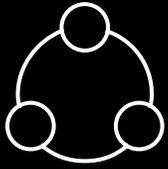
Striped Turtleneck Sweater  
\$75.00  
★★★★★ 12



Sailor Striped Cardigan  
\$110.00  
★★★★★ 12



Black Striped Scarf  
\$45.00  
★★★★★ 12

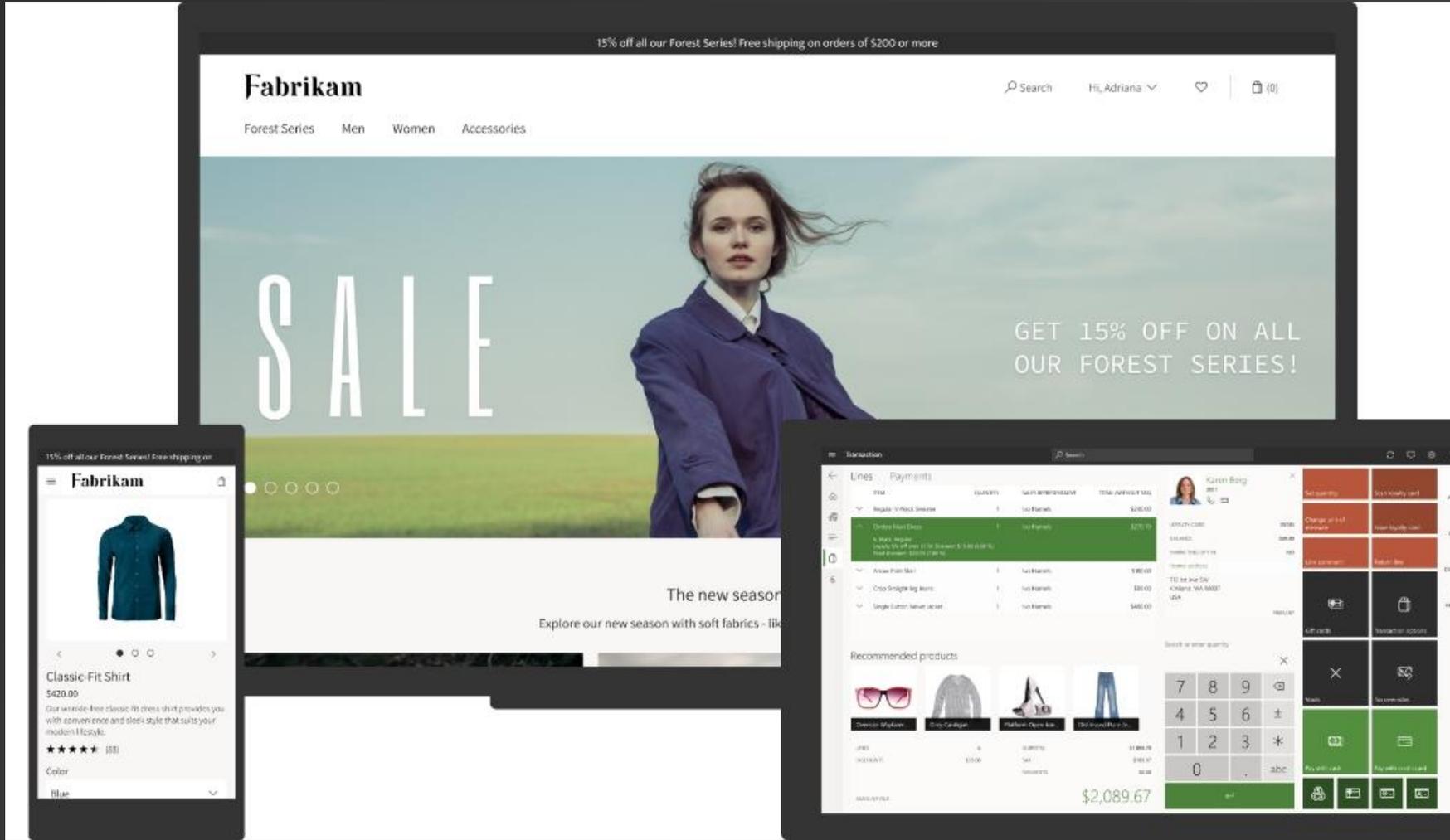


# Engage

Boost advertising performance

Unify commerce

Activate across every touchpoint



**Cameron**  
Marketing maven

Cameron can connect and orchestrate journeys across marketing, commerce, sales, and service with a shared view of every customer, enabling her organization to deliver exceptional experiences from lead generation all the way to loyalty.

# Use cases



Unlock your data to engage your customers and drive profitability



Predict customer intent, propensities, and next best everything



Deliver end-to-end experiences across the entire customer lifecycle



Orchestrate journeys in real time



Engage at every touchpoint



# Take the next step

## Visit the website

Learn how to personalize customer experiences by unifying your data and generating new insights:

<https://dynamics.microsoft.com/en-us/marketing/overview/>

## Start a POC

See what your data is telling you through a POC with trusted partners, sponsored by Microsoft.

Thank you



# Unified patient data sitting in a variety of IT systems for a 360-degree view.

"The flexibility, extensibility, and ease of use of Dynamics 365 enable rapid progress with data enrichment, and this ensures that we provide the best possible patient experience."

J.D. Whitlock  
Chief Information Officer



**Better understanding of known and unknown customers across in-store and online channels. Established a clear view of their loyalty program members by stitching together transactions.**

“This is a very important time to understand our customers. Many people are hesitant to go to restaurants, so we want to understand customers’ concerns and market to them in a highly targeted way that aligns with their values.”

Sashi Kommineni  
Director of Enterprise Analytics



**Raised more funds with precise segmentation and AI-driven insights. Reduced subscription churn by using predictive modeling to target donors most likely to respond.**

*“Dynamics 365 Customer Insights helps us to segment the right audiences, to focus on them, to engage them in a very relevant way, and to retain them.”*

Astrid van Vonderen  
Head of Fundraising



# Personalized multi-touchpoint customer journeys to create *user experience continuity*

"The *journey designer* is straightforward and easy to use. We have flexibility to trigger our journeys in multiple ways from our website and other Dynamics 365 products, and products from other vendors. The journey can also react to customer activities in real time."

Liz Lee  
IT Director, Leatherman Tool Group

**LEATHERMAN**<sup>®</sup>



# Mobilized 150,000 volunteers into hundreds of relief efforts – by consolidating multiple journeys into one event- triggered journey

“When I first heard about customer journey orchestration, to say that I was exhilarated, would be an understatement. Customer journey orchestration capability in Dynamics 365 Marketing has allowed me to build significantly fewer segments and has automated deployments that used to take my team and I hours to do.”

Dustin Lynch  
Team Rubicon Sr. Associate,  
Operations Support Mobilization



# Keep each customer informed throughout the customer support lifecycle

"With customer-led journey orchestration in Dynamics 365 Marketing, our agents can gain a real-time, 360-degree view of each customer and support their experience."

Jibu Mathew  
Project Manager, HP Inc.

