



**Building a unified vision  
of your customer using  
Dynamics Customer Insights**



## The proliferation of interaction channels

It's very common these days to see businesses rolling out new digital channels to interact with customers, usually in the form of websites, chat, social networks, mobile apps, or online stores.

This new landscape opens new opportunities to develop customer relationships through digital channels that, by nature, are scalable and cost effective. However, it also raises the challenge of maintaining a consistent customer experience through multiple channels, and to achieve this, a unified vision of the customer becomes more important than ever.

The idea of having a unified vision of the customer is far from new. However, the high volume of data and the disparity of data models that come with the implementation of different task-specific solutions, create silos that are difficult to integrate.

In addition, having all the data together is not enough. The ability to analyze the data, uncover insights and trigger actions is also a fundamental part of this equation. [Dynamics Customer Insights](#) provides a customer data platform that leverages the power of the cloud to achieve this.

## Key ingredients to build a unified view of your customer

According to the Customer Data Platform (CDP) Institute, a customer data platform is a packaged software that creates a persistent, unified customer database that is accessible to other systems.

Dynamics Customer Insights meets the three critical elements of this definition:



**Packaged software**

**Reduce the time, cost, and risk**



**Persistent, unified customer database**

**Comprehensive view of each customer**



**Accessible to other systems**

**Data can be used by other systems**

## 4 things to keep in mind while choosing a customer data platform

Before starting with any hands-on activities with a customer data platform, the following questions must be answered:

- **What are the different data sources that will be part of the unified customer profiles?**

The unified customer profile is built by consolidating the data available in multiple and separate sources. It could be a CRM application, a web analytics platform, an email marketing solution or a POS system.

Dynamics Customer Insights provides multiple connectors to facilitate the process of data ingestion, and the functionality provided by Power Query allows the selection and transformation of the attributes that will be part of the unified profile. The profile unification includes the definition of unique identifiers, AI powered rules to resolve identities, combine datasets, and the resolution of conflicts that might be present.

**• What are the interaction points that will be shown in the unified customer profile?**

Activities are the key interaction points that are visible from the unified profile. Activities are displayed in a timeline view and could include POS purchases, online purchases, online reviews, loyalty rewards, and digital marketing responses.

**• What are the KPI calculations and data enrichment needs to be identified?**

Customer Insights allow the calculation of KPIs using the ingested data. It could be the total online spend, total rewards, average purchase, and more. These KPIs can be calculated at the contact level and be included as a tile in the customer profile or as an aggregate value for a specific segment. Data enrichment can be provided by Microsoft or third-party services.

**• What external systems will consume data from the unified profile?**

Dynamics Customer Insights can be extended to other applications to create a complete solution.

After configuring the necessary components, you can use Customer Insights in conjunction with other solutions in the Dynamics ecosystem like Model driven apps, Canvas apps, Power BI and Power Automate

**Model Driven Apps:** Using the Customer Card Add-in you can surface the unified profile data in Dynamics Applications like sales and marketing

**Canvas Apps:** Dynamics Customer Insights can be added as a data source in canvas applications

**Power BI:** Power BI Desktop Add-in can be used to create visualizations for the Customer Insights data

**Power Automate:** It can be used to trigger events when data in customer insights changes

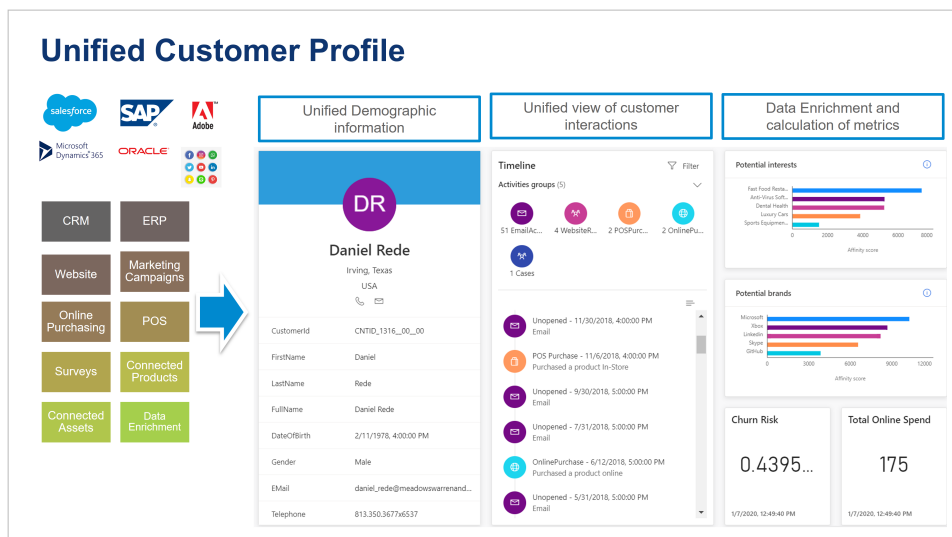


Figure 1: Unified customer profile including demographic information, interactions, data enrichment and metrics

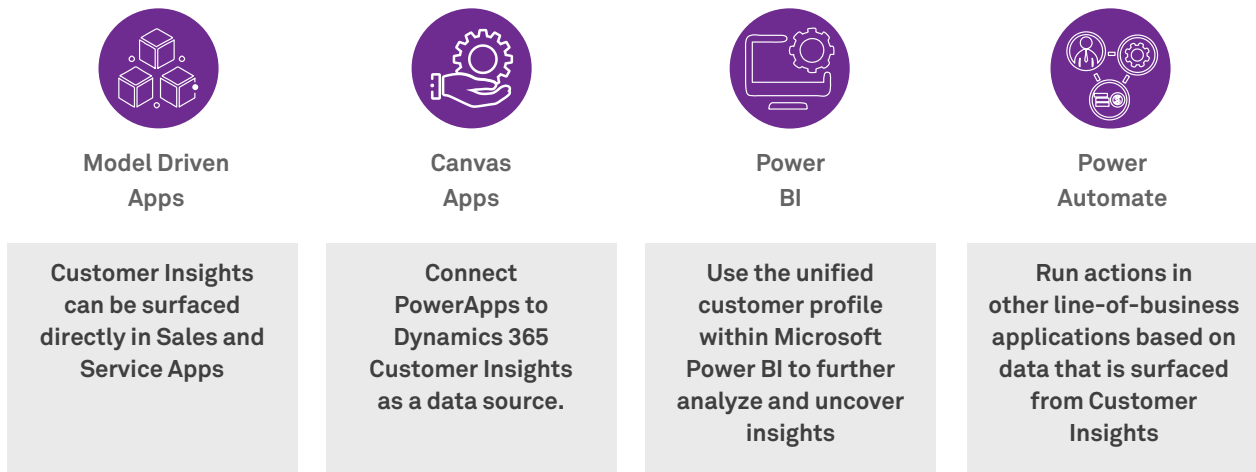


Figure 2: Solutions in the dynamics ecosystem that complement customer insights

All the data in Dynamics Customer Insights is available to external systems through built-in connectors:

API Connector	The API Add-in lets you work directly with your data. Perform functions including search, filter, and match.
Azure Blob Storage	Store your Customer Insights data in Azure Blob or use it to transfer your data to other applications.
Dynamics 365 Marketing	Use the segments created in Customer Insights to generate campaigns and leverage specific groups of customers with Dynamics 365 Marketing
Dynamics 365 Sales	Use your customer data to create marketing lists, follow up workflows, and send out promotions with Dynamics 365 Sales.
Microsoft Teams	Search for customer profiles without signing into Customer Insights with the help of a bot, right inside Teams.

Figure 3: Export customer insights data to external applications

For further questions or demonstrations,  
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## Conclusion

Dynamics Customer Insights enables you build a deeper understanding of your customers, through the consolidation of data from multiple sources in a unified profile and the ability to measure, analyze, enrich and export data to drive a better customer experience.

## About the author



### **Carlos A Perez Rodriguez**

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Carlos is a Dynamics solutions architect with 12+ years of experience designing and implementing business solutions based on Microsoft Dynamics. His experience involves overall digital transformation including business analysis, solution design and development for enterprise clients across industries like telecom, education, services and High-Tech. He has also worked extensively with implementing Dynamics Sales, Service, Marketing, Field Service, Powerapps, and Power BI.



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Praseon has 19+ years of experience in helping global businesses in enhancing their customer experience, from strategy to execution. He is passionate about technologies that enhance customer experience and has designed and managed CRM & CX technology implementation programs across Europe, USA and Australia. In his current role, Praseon leverages digital customer experience products suite based on Microsoft Dynamics 365 and Microsoft technologies.



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