

GUIDE

Microsoft Customer Insights Journeys.



ANS

Think Bigger.

What is Dynamics Customer Insights Journeys?

Customer Insights Journeys helps you elevate customer experiences with timely, personalised content delivered through the right channels. Use connected marketing tools to:

- Engage customers in real-time
- Build nurture journeys that create sales-ready leads
- Increase audience engagement with personalised content
- Measure the impact of your marketing activities

Customer Insights Journeys works seamlessly with Dynamics 365 Sales, Microsoft Teams, Outlook and other Microsoft apps, allowing you to access data in the flow of your work.

Complete view of customer journey.

Customer Insights Journeys brings together sales, marketing and service teams in a single platform to provide shared visibility of your customer journey.

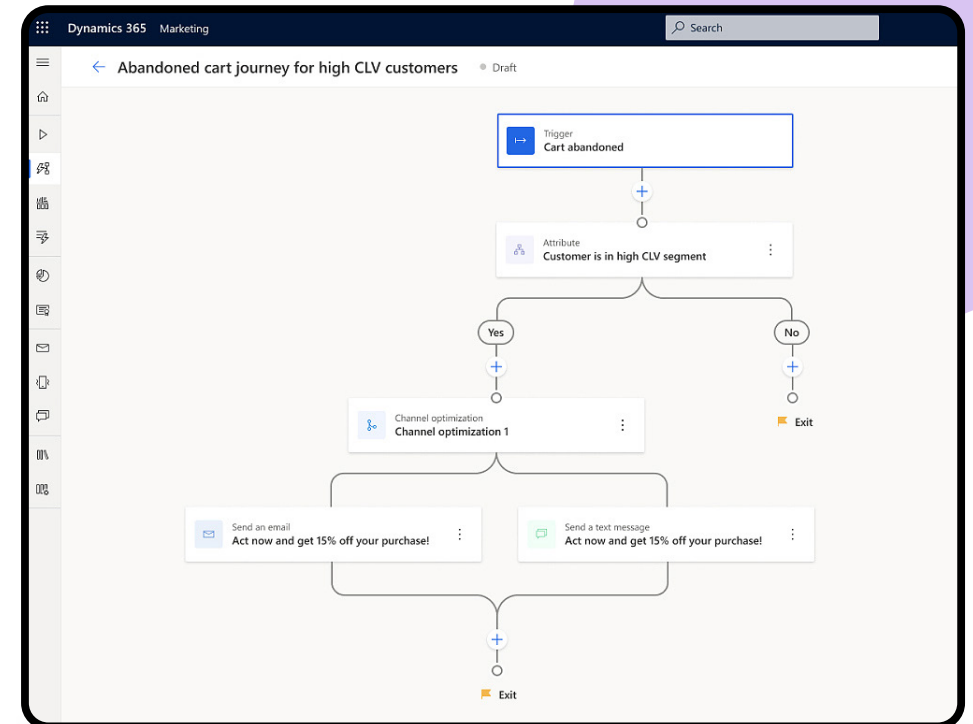
- Get a 360-degree view of your audience by tracking their interactions across channels.
- Follow a contact's journey from the first touch point to deal closure.
- Personalise messages by understanding how customers interact with your site and content. See which email they opened or clicked and which pages they browsed in a unified timeline.



Engage customers in real-time.

Increase engagement by responding to customers' actions in real-time across multiple channels.

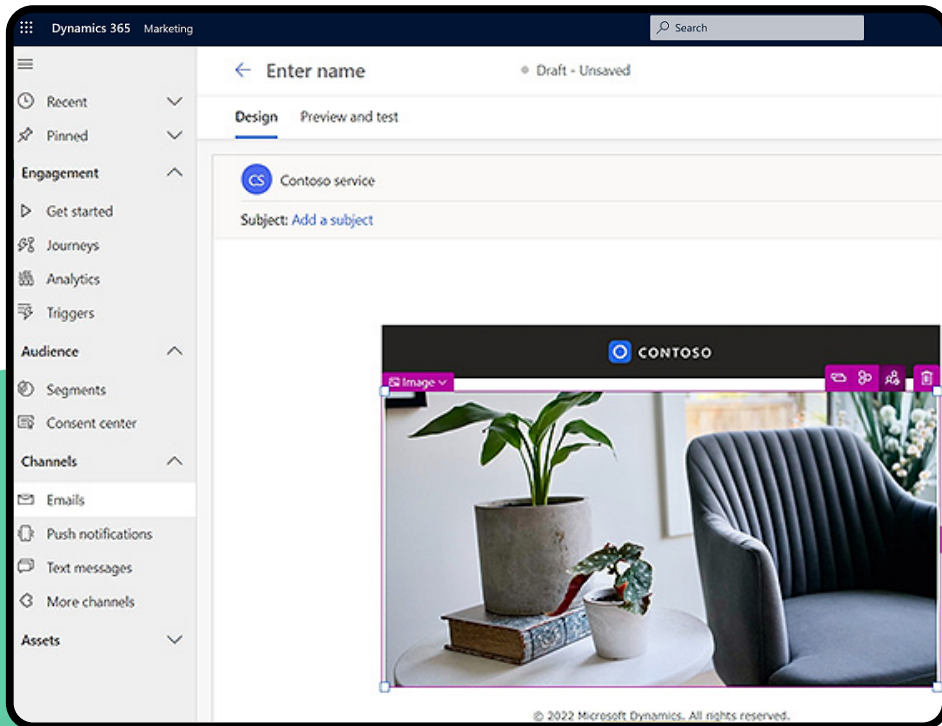
- Deliver one-to-one experiences by triggering journeys at critical moments, for instance, when users interact with your emails or when Dynamics fields are updated, such as marking an opportunity as inactive.
- Develop meaningful connections with your audience across email, SMS, push notifications, and even custom channels including WhatsApp.
- Encourage customer action by sending timely reminders and recurring messages until they complete a certain action.



Personalise your communications.

Nurture prospects to maximise engagement using highly personalised email content, without writing code.

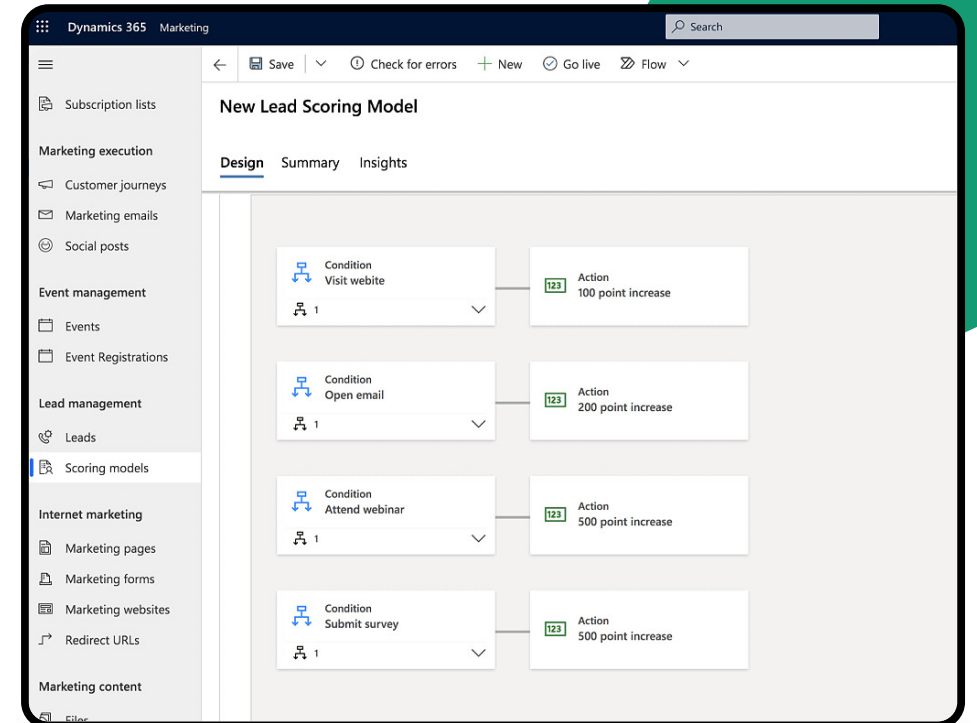
- Take personalisation to the next level with dynamic and conditional content.
- Easily tailor messages to reflect your recipient's interests, demographic or geographic information by adding different images, buttons and links without making code changes.
- Experiment and refine your messages using A/B testing to see what content truly resonates with customers.



Improve lead quality.

Create a consistent lead qualification process and identify sales-ready leads by defining a scoring model.

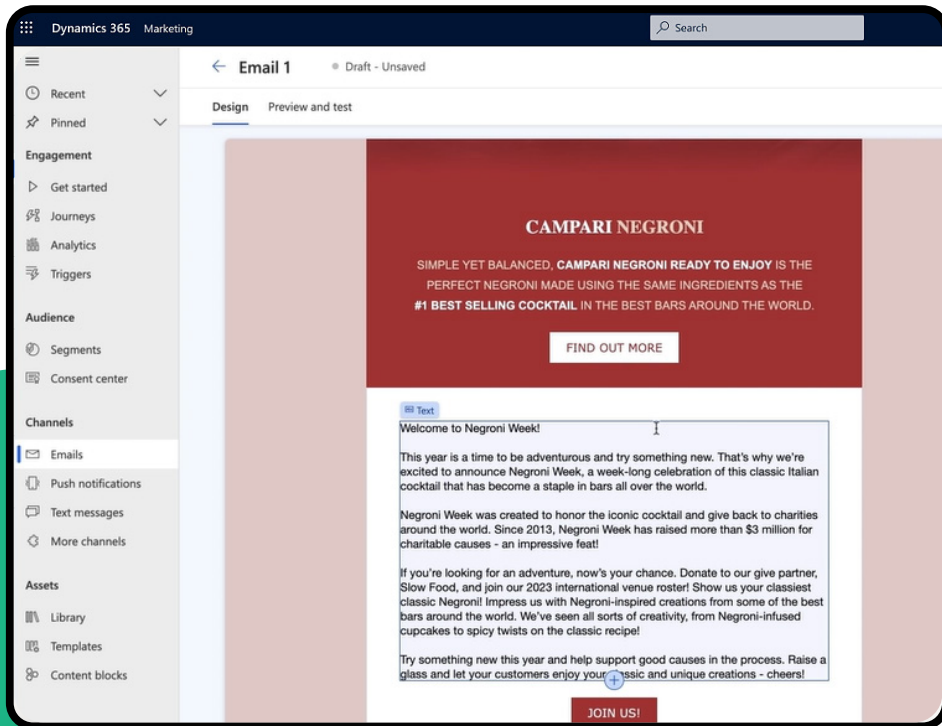
- Identify and qualify leads using an automated scoring model based on interactions, demographic or firmographic details.
- Assign a weighted score to each action. Decrease scores if no recent engagements are tracked to ensure only active leads are picked up.
- Increase conversion rates by automatically routing leads to sales when the score crosses a threshold to receive personalised attention.



AI-powered optimisations.

Save time and effort in crafting marketing content and audiences with the AI capabilities of Customer Insights Journeys.

- Create email content ideas faster by just describing what you need in simple language.
- Outline the key messaging points for an email, and Dynamics will automatically draft the content for you, consistent with your brand style and tone and within the context of your existing emails.
- Quickly create audience segments using natural language queries without manually navigating data tables.



Build lead generation forms.

Easily create and embed web forms to capture customer data from your landing pages.

- Quickly create and publish forms that allow customers to create a call-back request, schedule a demo or sign up for newsletters on your website.
- Use intuitive drag-and-drop controls to add fields to your forms.
- Manage your audience's preferences for marketing communications with built-in consent management.



Social posting.

Manage your social media presence by scheduling and posting messages on your social accounts directly from Customer Insights Journeys.

- Plan your social content calendar and schedule messages to be sent when the probability of engagement is high.
- Evaluate the impact and reach of your social media activity within Dynamics 365.
- Import leads generated by your LinkedIn ad campaigns into Dynamics using the LinkedIn lead gen connector.





Simplify event management.

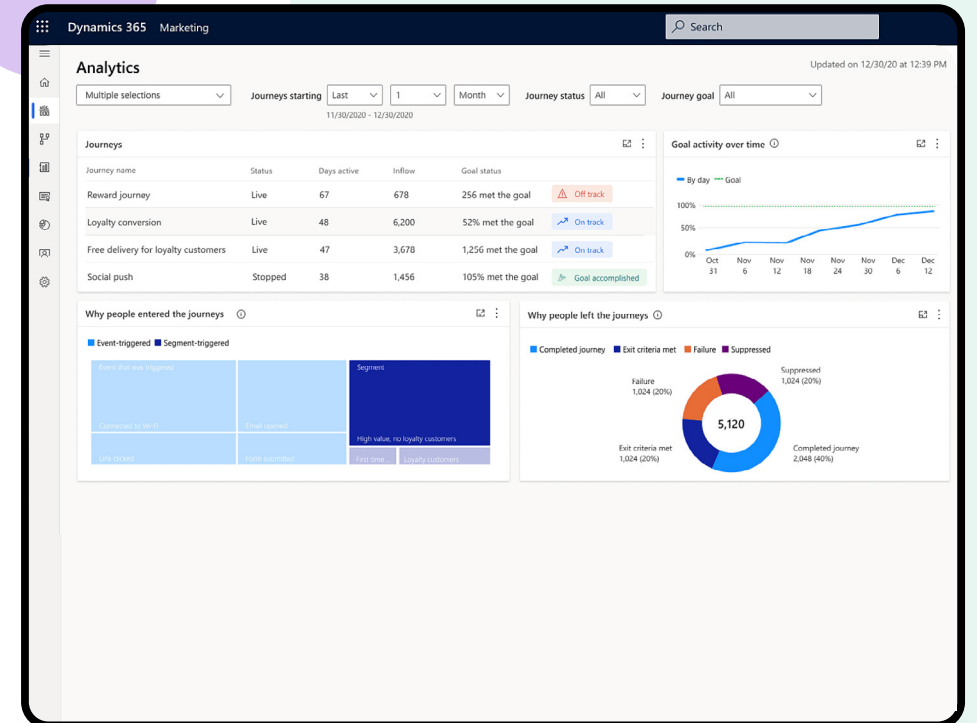
Seamlessly handle any type of event - online, on-site, or hybrid using Customer Insights Journeys.

- Streamline your event management process, from handling the registrations and attendees to speakers and sponsors, all within a single system.
- Save your time and effort by automatically sending registration confirmation, payment info, event reminders or any other messages to participants.
- Promote your events to maximise attendance and send follow up messages to engage and nurture participants after the event.

Measure your success.

Evaluate the effectiveness of your marketing with built-in marketing dashboards and reports.

- Understand how your marketing activities drive engagement and contribute to your overall revenue based on an attribution model.
- Discover what is working so that you can amplify or recreate the same approach.
- Gain insights into your audience's behaviour and interests and tailor your marketing efforts to their specific needs.



Implementing Customer Insights Journeys.

Our onboarding program helps marketing teams swiftly transition to Customer Insights Journeys and become self-sufficient in managing their campaigns.

You'll get access to...



**All standard Dynamics 365
marketing automation capabilities**



**Assistance with your
first marketing campaign**



**Training and
onboarding workshops**



Our approach.

Marketing review

We'll explore your current marketing maturity level, review your processes, discuss current challenges and share our recommendations.

Install

We will configure your email-sending domains and apply the essential marketing settings based on your requirements.

Workshops

One of our consultants will work alongside you to build your first campaign using Customer Insights Journeys.

Managed Service

You'll have access to helpdesk support, training and consultancy services to implement further improvements.

Get in touch.

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