

Dynamics 365 Customer Insights

Frequently asked questions



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Positioning

1. What is Dynamics 365 Customer Insights?

With Customer Insights, organizations can unify their customer data to optimize customer engagement. They can bring data from all sources together to gain a single view of customers and discover insights that drive personalized experiences.

2. Why is Microsoft bringing this product to market?

Organizations are quickly recognizing the urgent need for a deeper understanding of customers. To achieve that, organizations need to unify customer data scattered across different systems. A Customer Data Platform (CDP) is a system that unifies an organization’s customer data from all channels and sources. Data is pulled from multiple sources, standardized, enriched, and made available for direct access and segmentation to create a persistent, unified customer database that is accessible to other systems. This data is also made available to business applications where it can be used to facilitate actions such as web personalization and marketing campaigns. Microsoft’s solution for CDP is Dynamics 365 Customer Insights. The self-service, prepackaged solution enables organizations to:

- Gain a holistic view of customers
- Unlock insights and take action
- Adapt and extend the solution

3. What type of organizational roles and departments should I be prepared to share the value of Customer Insights with?

The primary roles to target are LOB leaders, such as VP of Marketing, Sales, or Service. With the insights derived from this solution, their teams will be able to optimize customer engagement as well as business processes. Dynamics 365 Customer Insights is designed specifically for business users to manage and use, so they don’t have to rely on specialized resources to gain insights.

Other roles within the organization also benefit from Customer Insights. Here is a summary of the capabilities by roles:

Business Users

- 360-degree customer view with profile cards, customer journey timeline, and dashboards
- Embedded contextual customer cards within Dynamics 365

Data Analysts / Admins

- Utilize the extensive connector ecosystem to ingest customer data
- Ability to unify customer data and get it into Common Data Model form in ADL
- Cleanse and standardize customer data across sources with AI-powered experiences
- Click-no-code configuration and debugging experience
- Enrich customer information with insights, such as brand affinity and interests, from audience intelligence from Microsoft Graph

Business Analysts

- "Customer Master" as part of the platform, providing the most comprehensive source of customer data in the organization
- Customizable profiles, measures, and segments to power engagement and business processes
- Build custom applications and dashboards through the native Customer Insights to Power Platform integrations or REST APIs

4. Is this the same as Customer 360 or Dynamics 365 for Customer Insights?

No, this is a new solution. "Customer 360" was an internal name used during private preview. The official product name, timed with the public preview launch on 2/21/19, is "Dynamics 365 Customer Insights." Microsoft did have a product in preview called "Dynamics 365 **for** Customer Insights," but that preview ended 6/1/18. Although this solution has a similar name, and while user feedback from the previous preview deeply informed our approach, Dynamics 365 Customer Insights is a net-new product built from the ground up to offer a better solution for organizations seeking a holistic, end-to-end view of their customers to optimize engagement.

5. How is this different from Azure Customer 360?

Dynamics 365 Customer Insights is a finished SaaS application. In addition, the solution has a rich ecosystem of ISVs that provide solutions on top of Azure through the Azure Marketplace targeted at IT/dev personas.

6. How does this solution relate to AI for Sales, AI for CS, etc.?

Customer Insights is foundational -- and across functions -- Sales, Marketing, Service, etc. As part of the roadmap, we also plan to more deeply integrate the Customer Insights customer profile with the rest of the Dynamics AI apps.

7. Is the solution positioned for B2C or B2B?

Today, the solution primarily supports B2C scenarios.

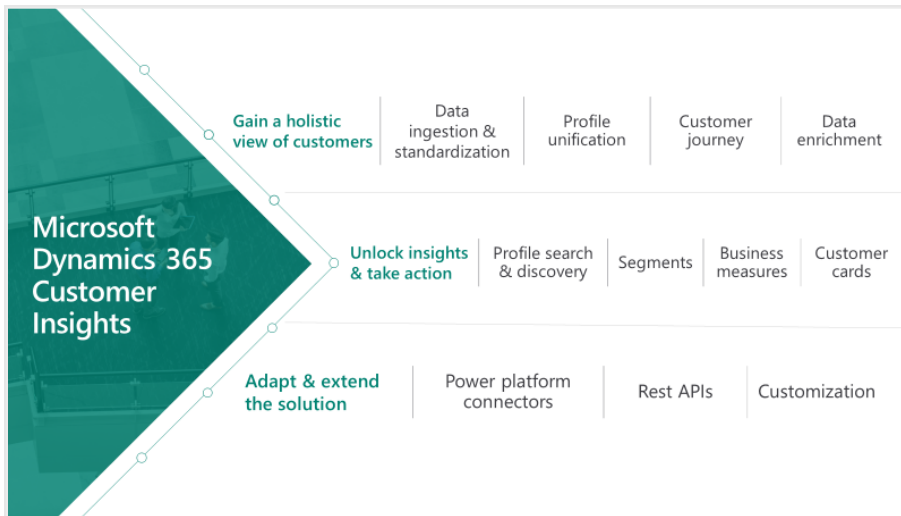
Product overview

1. What does the solution do?

Microsoft’s prepackaged, business-managed solution makes customer insights a reality for organizations of all sizes. The solution automates the orchestration of customer data and ultimately empowers employees to connect and engage with customers in the moment. Organizations can obtain a truly complete view of each customer across channels – from campaign responses, website visits, in-store visits and purchases, online purchases, loyalty redemptions, customer service encounters, or social interactions. The solution enables administrators to bring in customer data from various sources with ease, whether the data is transactional, behavioral, observational, internal, or external. Additionally, the solution standardizes the data and applies built-in AI to automatically match and merge the customer records into one comprehensive customer profile. In addition, organizations can create richer profiles with brand affinity and interests from Microsoft Graph, which provides aggregated proprietary predictive signals. With accessible, persistent, and up-to-date customer data, the entire organization has a single source of truth on top of which analytics, AI, and ML can be applied to derive insights and KPIs that power personalized experiences and optimize business processes across all channels of engagement.

2. What are the capabilities?

Customer Insights consists of 3 pillars. The first pillar, gain a holistic view of customers, is all about data. It enables organizations to unify customer data scattered across transactional, behavioral, and observational systems and to standardize the data. The second pillar, unlock insights & take action, enables organizations to harness the data for actionable insights. The third pillar, adapt & extend the solution, enables organizations to fully customize the pre-built solution to address specific industry/business needs.



3. What are some common uses for Customer Insights within an organization?

Business scenarios that can be powered by the insights from Customer Insights include:

Marketing scenarios:

- Lead gen & scoring – more accurately predict which prospects are most likely to convert by using richer customer profiles that incorporate not only transactional and behavioral data but also brand affinity and interests from Microsoft Office Graph which provides proprietary, aggregated predictive signals
- Segmentation/campaigns/offers – create more accurate and micro-targeted segments to better reach prospects and customers; send segments to executional tools for email campaigns, mobile messaging, etc.
- Website & content personalization – remember, recognize, and reward customers with data-driven personalization of content that generates an emotional connection; personalization is central to a customer-centric mindset and demonstrates an awareness of the customer’s evolving needs

Sales scenarios:

- Product recommendations/cross-sell/upsell – provide customers with data-driven recommendations for complementary products or services instead of just the things the customer has already browsed or purchased
- Next best action – surface the next best action for salespeople so they can proactively and confidently engage with customers

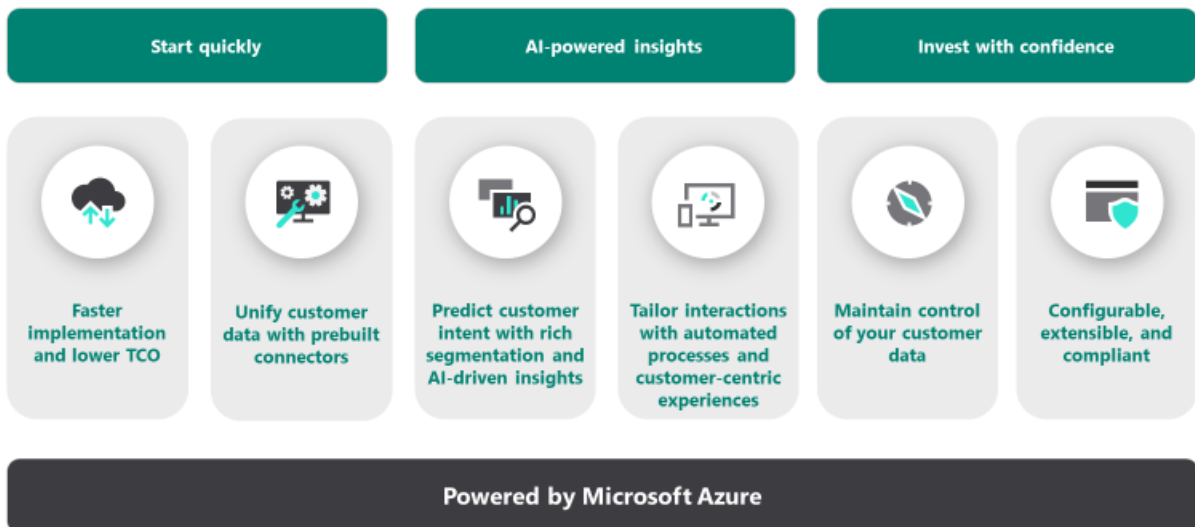
Service use cases:

- Proactive support – by utilizing rich and robust customer profiles generated by Customer Insights, call center agents can deliver not only personalized, but also consistent interactions
- Intelligent routing – decrease response and resolution time with data-driven routing that better matches cases or calls with agent experience or skills
- Omni-channel – democratize data and empower front-line employees to make decisions, e.g. having a 360° view of the customer, including the customer journey, enables an agent to make calculated exceptions for high-value customers

4. What are the differentiators, especially for existing Dynamics 365 customers?

Customer Insights can increase the value of existing Dynamics 365 business applications. The LOB applications, when infused with insights, become more valuable and essential to business users. Rather than being a system that just monitors and controls what employees do, the business applications turn into a source of insights and guidance, empowering employees to do their jobs better and to personalize customer engagement. Specifically, the MSFT field should focus on the following product differentiators:

Why Dynamics 365 Customer Insights



5. What languages are supported?

At GA, Customer Insights will support 7 languages – Danish, Dutch, English, French, German, Italian, and Spanish.

6. Can Customer Insights be integrated with other applications?

First, Customer Insights provides out-of-the-box customer journey timeline, customer cards, and KPIs which can be embedded in Dynamics 365 to provide business users the actionable insights necessary to power personalized engagement. Second, organizations can utilize the prebuilt connectors for Microsoft PowerApps, Power BI, and Flow to build custom applications, dashboards, and reports with embedded insights from Customer Insights, and define workflows based on Customer Insights profiles. And third, organizations can activate insights within any business process through rich REST APIs that enable easy programmatic integrations with other LOB applications, custom workflows, or custom mobile applications.

7. How often is the data ingestion?

We offer 4 data refreshes each day. Each data refresh takes about 4 hours, so that's a reasonable refresh rate, covering 16 business hours.

8. Does the solution address common Customer Hub scenarios like record survivorship, data steward view?

No, not at this time.

9. Can the customer bring their own data repository (assume it's a data lake) and/or their own AI/ML models?

Yes, the solution can ingest data from an existing lake. Yes, customers can bring their own AI/ML model too with our integration with Azure ML.

10. Does this solution support anonymous data?

No, the solution doesn't support anonymous profiles.

11. What does the roadmap for Customer Insights look like?

For roadmap information please review the [release notes](#) and the [roadmap website](#).

12. Who are the expected main competitors for this application?

Competitors range from start-ups to established vendors, including:

- Amperity
- Salesforce Customer 360
- Oracle CX Unity

For additional compete analysis, please see the Battlecard and Compete Deck (coming soon) on [Infopedia](#).

13. Are there any customer restrictions to using Customer Insights?

The solution is not available in sovereign clouds.

Selling guidance for the field

1. Why should I consider selling Customer Insights?

Customer Insights provides the foundation for organizations to understand their customers. Because it complements Dynamics 365's LOB applications such as Dynamics 365 for Customer Service, Microsoft sellers can increase deal size by bringing in this solution.

2. How can I use Customer Insights to drive digital transformation conversations with my customers?

To compete in today's market, organizations need to build meaningful relationships with their customers on a personal level. The ability to effectively personalize at scale requires a complete, unified view of customers. Unified customer data incorporates transactional data like online/offline purchases and behavioral data like social media activities, website interactions, offer engagement, and help desk interactions. When brought together, the data becomes an asset from which insights are derived. With Customer Insights, organizations can finally deliver personalized experiences through 1:1 interactions, relevant offers, or product recommendations, all at the right time and right place/device.

Organizations have been collecting customer data for years. The trouble is all that data exists in separate silos, languishing in systems that were never designed to integrate with one another. This results in disparate systems, siloed and inaccessible data, and fragmented customer profiles. Without a reliable way to bring the data together, organizations can't make use of the data and are left struggling to compete in a new landscape where buyers have come to expect personalized, seamless experiences.

Readiness

1. How can I get trained and provide feedback?

MSFT field sellers will get access to a Live Drive experience, which includes a fully configured Customer Insights instance and as well as a guided walk-through experience.

2. Where can I find assets/resources to help me sell?

There is a new page on [Infopedia](#) for Customer Insights. The MPF, Pitch Deck, and What's New are available to help you learn about and position the solution with customers.

3. Are there any relevant case studies or reference customers for Customer Insights?

Please visit [Infopedia](#) for the latest customer case studies. Please visit YouTube for customer videos:

- [Launch video](#)
- [Marston's](#)
- [Tivoli Gardens](#)

General availability

1. When is the product GA?

The product will GA April 1, 2019. At that time, the public preview will conclude.

2. How can prospects try the GA product?

Yes, there is a 30-day free trial. The trial comes prepopulated with sample data. Prospects can bring in their own data too. Trial sign-up is available from the Customer Insights web page.

Licensing

1. What is the licensing model?

Licensing consists of the application and add-on capacity.

Pricing / Licensing	\$1500 Per tenant/month
Qualifying offers	No purchase requirements
Default capacity	<ul style="list-style-type: none">• 100K Profiles• 20 Insights (KPIs)• 4 data injection refresh/day
Capacity add-on	Profiles: \$1000/100K/tenant/month – no min requirements

	Note: purchasing additional capacity does not increase the number of Insights (KPIs) or allowed data injection refreshes.
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2. Is this a stand-alone or add-on solution?

Customer Insights is a stand-alone Dynamics 365 AI application. It brings in data from multiple data source using prebuild connectors (based on Power Platform). It connects to Microsoft solutions such as Dynamics 365 business applications, Power BI, Flow, and PowerApps, but can also connect to other solutions through REST APIs.

Data privacy

1. Does Microsoft gather information from Windows, Bing, Edge, Internet Explorer and other services (both on desktop and mobile) to feed into its business applications?

We leverage aggregated audience insights from the Microsoft Graph. Artificial Intelligence models help analyze anonymous interests, age and gender demographic information to infer purchase and consumer engagement patterns to drive next best actions.

2. Can Dynamics 365 Customer Insights integrate with/leverage data from other platforms, 3rd party services? i.e. Salesforce, Oracle, Google, etc.

Yes. Customer Insights has pre-built connectors that can connect to on-prem and online sources from Microsoft applications and other 3rd party services.

3. Once you unify the data sources in Customer Insights, is it easily undone?

Yes. Unification of data from disparate sources can be configured to remove sources or add new sources at any time.

4. Once you unify and give access to applications in Customer Insights, can you limit what the applications can do with the data?

Yes. This is fully controlled by the customer’s administrator at an organization using Customer Insights.

5. Once you unify and give access to applications, can you rescind access?

Yes. There is an administrator / permissions section in the Customer Insights applications that allows a customer the ability to rescind access to users.

6. Does this affect our data mobility or migration capabilities?

For Customer Insights, data is stored in a secure Azure Data Lake of the organization’s Azure tenant. The customer administrator can fully export and migrate data as they wish.

7. Do consumers have access to their data that is being collected?

Customer Insights does not collect any data directly from end customers. Data is only ingested into Customer Insights from an organization's system that an organization's administrator chooses to bring into Customer Insights.

8. How easy is it for users to opt out of data collection?

This is dependent on the opt out policies of the organization that is using Customer Insights

9. There is growing distrust among consumers around how big tech tracks and uses data – how is Microsoft ensuring that data privacy takes priority over commercial gain?

Much of the potential of new technologies depends on analyzing large data sets to help unlock new insights, create new services, or just to make everyday tasks a little easier. But the ability to leverage data sets must be balanced with protecting the privacy of those individuals whose information forms their basis. Managing, storing and processing this data brings new responsibilities for Microsoft and for our customers. Microsoft's approach to privacy is grounded in the belief that our customers own their data, and we back up this belief with concrete actions to protect our customer's privacy and give them control over their data. We use customer data only to provide the services we have agreed upon, and do not mine it for marketing or advertising.

10. If users request their data to be removed from Microsoft's data lakes, how will you ensure that change is cascaded to customer and partner systems as well?

The data is ingested from an organization's systems into Customer Insights. When data is removed, it will cascade into the Customer Insights application on an update/refresh process.

11. How does Microsoft help ensure data privacy with data security?

Microsoft has over 3,500 cybersecurity professionals to help deliver security operations that help protect, detect and respond to threats, delivering security operations that work for our customers.

12. Do we have resources to help customers remain compliant with the unification of their customer data? How do we assist our customers if their customers make a data discovery request?

We help our customers to find, refine, and review data with intelligent search tools allowing customers to respond quickly and effectively to scenarios such as litigation, assessments, customer requests, and investigations.

13. What are the privacy implications for government customers, specifically in law enforcement? Will law enforcement agencies be able to leverage consumer data?

Customer Insights is available through Volume Licensing and Cloud Solution Provider Program for Commercial, Education and non-Profit. Customer Insights is not currently available for Government institutions.