

Using Customer Relationship Analytics to Power Business Decisions Microsoft 365 & Azure Synapse





Enterprises have adapted dynamically to the challenges posed over the recent years

Customer profiles exist in numerous systems (online, in person, phone, reseller, etc.)



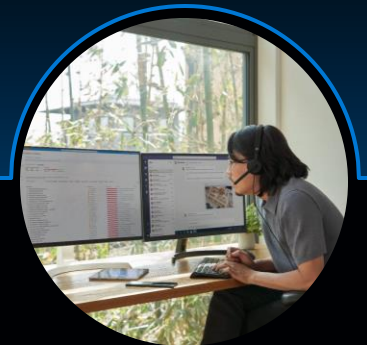
Customers engage in a myriad of ways (Email, Social, Chat, Phone)



Actual customer buying patterns are varied and inconclusive



Collaboration on documents replaced joint working sessions





**Fast and
dynamic and
often decentral
adoption
impacted
transparency
and efficiency**



Fragmented customer response processes with gaps between documented and “as-is” processes



Identifying the right owner/approver/expert



Unclear decision processes and communication flows



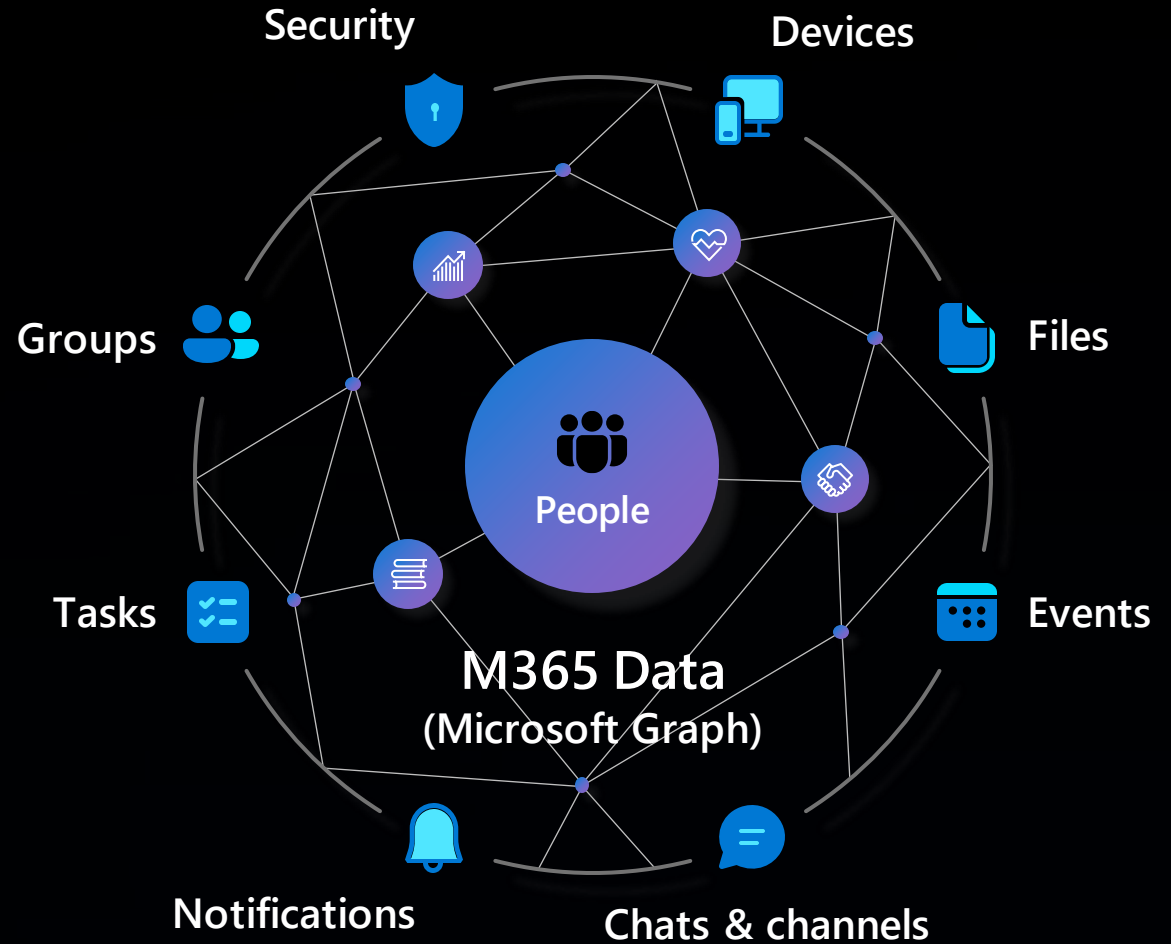
Lack of transparency between different departments



Missed optimization and growth opportunities



Identifying collaboration and communication patterns are key to achieve real business agility





Give your client facing roles the insights they need to delight their customers



Eliminate client frustration with personalized online engagement

Outflank your competition with coverage strategies based on predictive models

Automate simple services & focus employees on high value customer needs

Prevent costly redundant activities with cross-functional collaboration insights



Customer Relationship Analytics Use Cases



Relationship Mesh

Integrate customer/seller relationship data from various systems together into a single view with actionable insights at the area & individual account level



Customer 360

Combine the power of Azure Synapse with Dynamics 365 Customer Insights and Microsoft 365 to build a comprehensive view of customers experience possible



Customer Issues Management Solution

Ingests customer complaints from email, chat, social media, intelligently classify, and surface to the correct support agent for quick resolution



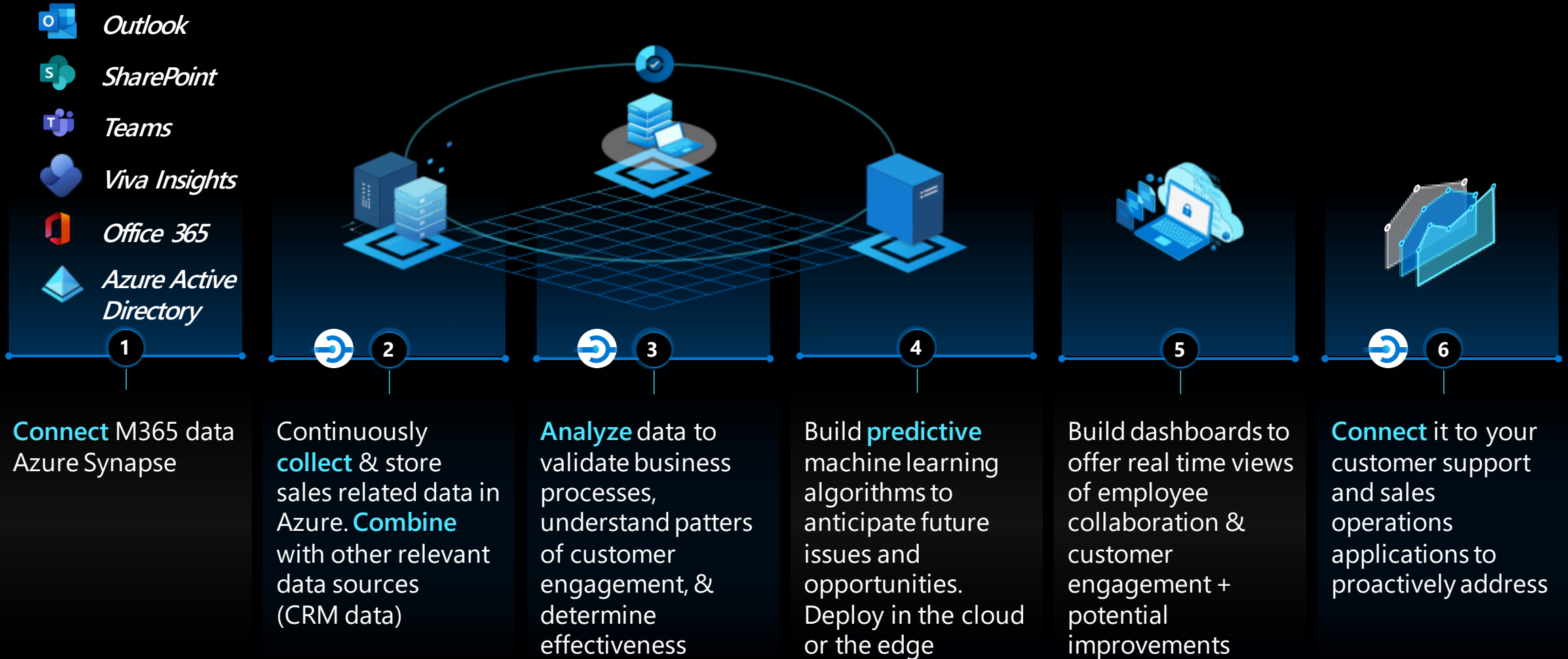
Customer Conversation Lineage

Integrate Microsoft 365 email conversations with CRM or Ticketing information to create a single view with customer sentiment analysis



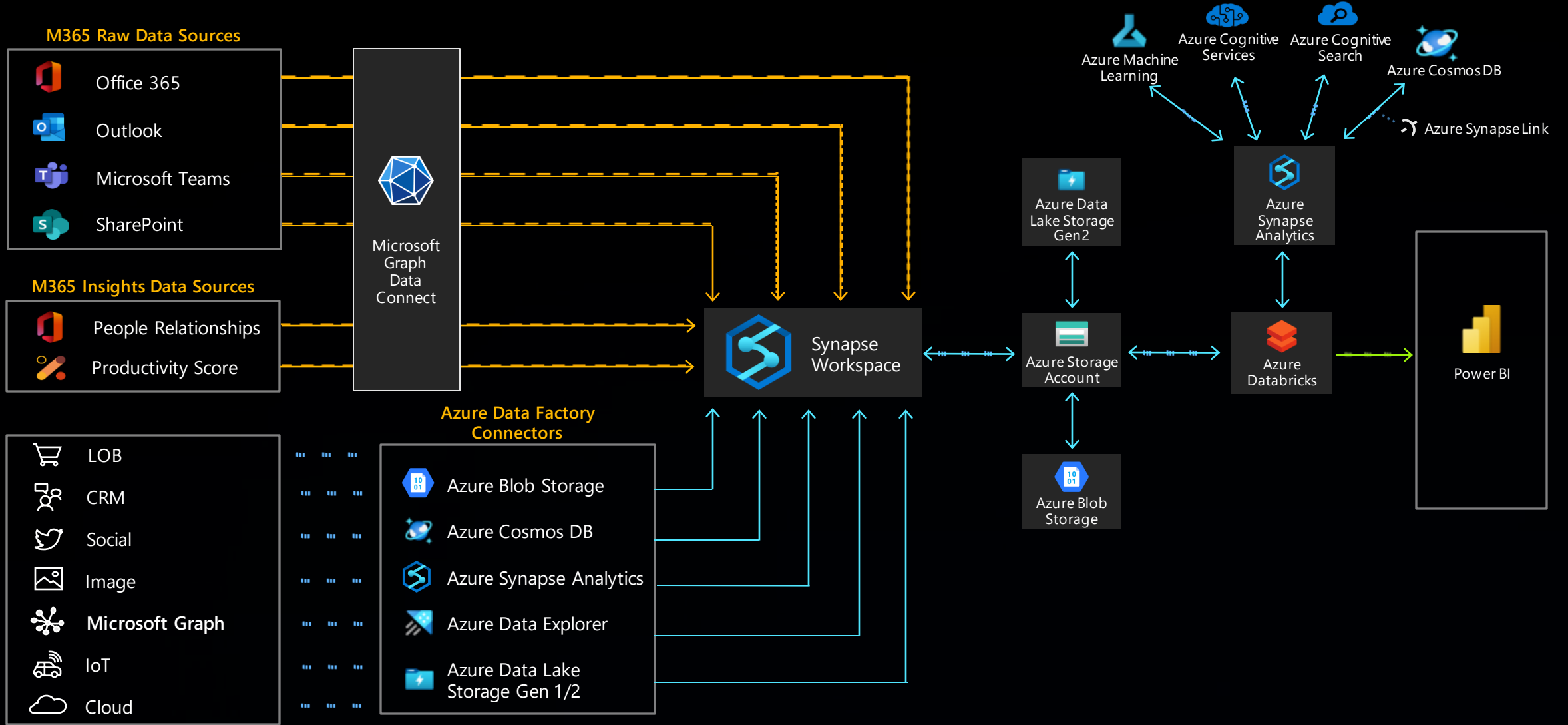
Customer Relationship Analytics – How it works

Use M365 collaboration data to identify the most effective ways to engage customers, minimize redundant activities, and increase customer satisfaction.



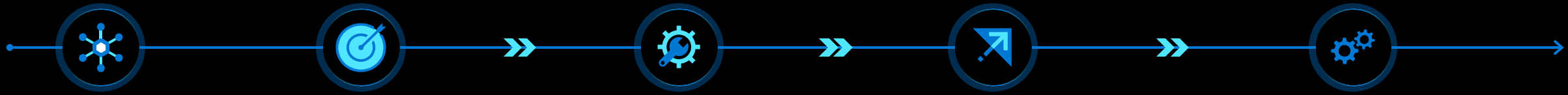


M365 Analytics Architecture





Extend Existing Customer Relationship Insights



Use Cases

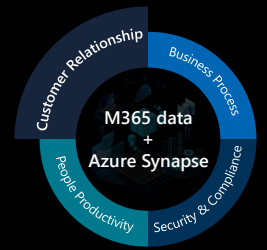
Initial Challenge

Initial Solution

Remaining Challenge

M365 Solution

Relationship Mesh	Inability to track, nurture, and improve customer relationships. Lack of visibility during sales cycle stages makes it impossible to provide sales guidance	CRM systems document conversations and emails via "self-reported" customer interactions	Sales leadership lack insights into depth of "actual" customer relationships: strength of relationship and customer sentiment	Pair M365 data and CRM system data to gain a complete view of your customer communications and provide effective sales guidance
Customer 360	Need to understand previous customer interactions and touchpoints to drive highly contextualized, effective conversations	CRM systems document your company's customers interactions with as progress through the sales funnel	Still missing all the points communication with a customer. Track complete customer journey (event, trial, sale, implementation, active consumption)	Develop a 360 view of customer's journey to have effective conversations that recognize all the points of contact with your organization
Customer Issues Management Solution	Inability to address increasing volume of complaints. Lack of a complaint queue leads to disorganization, redundancy, and a slowdown in the rate of responses	Customer support systems address customers complaints and basic product challenges	Complaints come through many disparate systems (email, chat, social) are not actively staffed and end up falling through the cracks leading customer aggravation	Aggregate customer complaints coming from multiple channels (email, chat, social) into a single system that can be addressed by customer support
Customer Conversation Lineage	Need to share information across the organization at scale to create alignment and visibility for key topics (i.e.. vision statement, product roadmap)	Use Outlook as an email client to send rules-based emails to select recipients for your email campaign	Unclear if internal email campaigns are effective in disseminating information (read through rate). Need to track patterns of communication at scale	Leverage M365 data to figure out what works and craft highly engaging internal campaigns with measurable results. Learn how content is shared internally through the organization



Relationship Mesh

Integrate customer/seller relationship data from various systems together into a single view with actionable insights at the area & individual account level

Today's Challenges



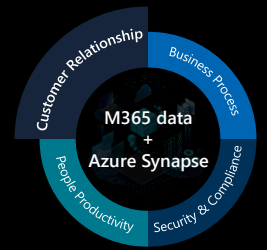
Lack of insights into customer relationships: strength of relationship, frequency of communication, customer sentiment



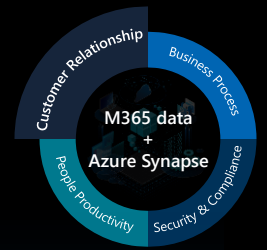
Overburdened sellers managing large territories are unable to provide customized customer care due to lack of time and structured data management



Lack of visibility inhibits strategic account planning



Relationship Mesh Solution



Enable **efficient, automated pipelines** to bring Microsoft 365 and CRM data together in Azure



Define **ruleset** to calculate the connectivity score between internal and external contacts



Gain **timely analytics and insights** that help improve relationships between sellers with high priority accounts



Establish a detailed view of relationship **event tracking and a checklist** to make it actionable

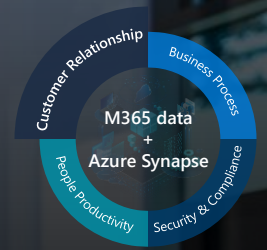


BENEFITS

- Minimize customer churn, increase loyalty, and generate more revenue in every account
- Programmatically manage and improve customer interactions at each stage of the sales cycle
- Get visibility into your accounts and establish clear next steps

Case Study: Customer Relationship Mesh

Global Investment Firm Uses Azure Synapse and M365 Data to improve critical customer relationships



BUSINESS CHALLENGE

- Building strong relationships with customers is very important to improve customer retention, loyalty and revenue
- Insights about the strength of relationship with customers and their key contacts will enable the teams to take required actions to manage and improve the interactions at different stages in a customer engagement life cycle

SOLUTION

- Using MGDC they have built an impact score that calculates based on the type and recency of interactions to address and develop a more accurate sales pipeline
- This solution accelerator helps developers with all the resources needed to build a Relationship Mesh Solution that gives a summary view of all the key accounts and a detailed view of interactions at individual account level


RESULT

- With this new data leadership can clearly and accurately identify last engagement time with a customer or prospecting list
- Gained timely analytics and insights that help improve relationships between sellers and high priority accounts
- Establish a detailed view of relationship event tracking to make actionable progress

SOLUTION ELEMENTS



Microsoft
Graph Data
Connect



Microsoft 365

- Sent emails
- Attachments
- Contacts

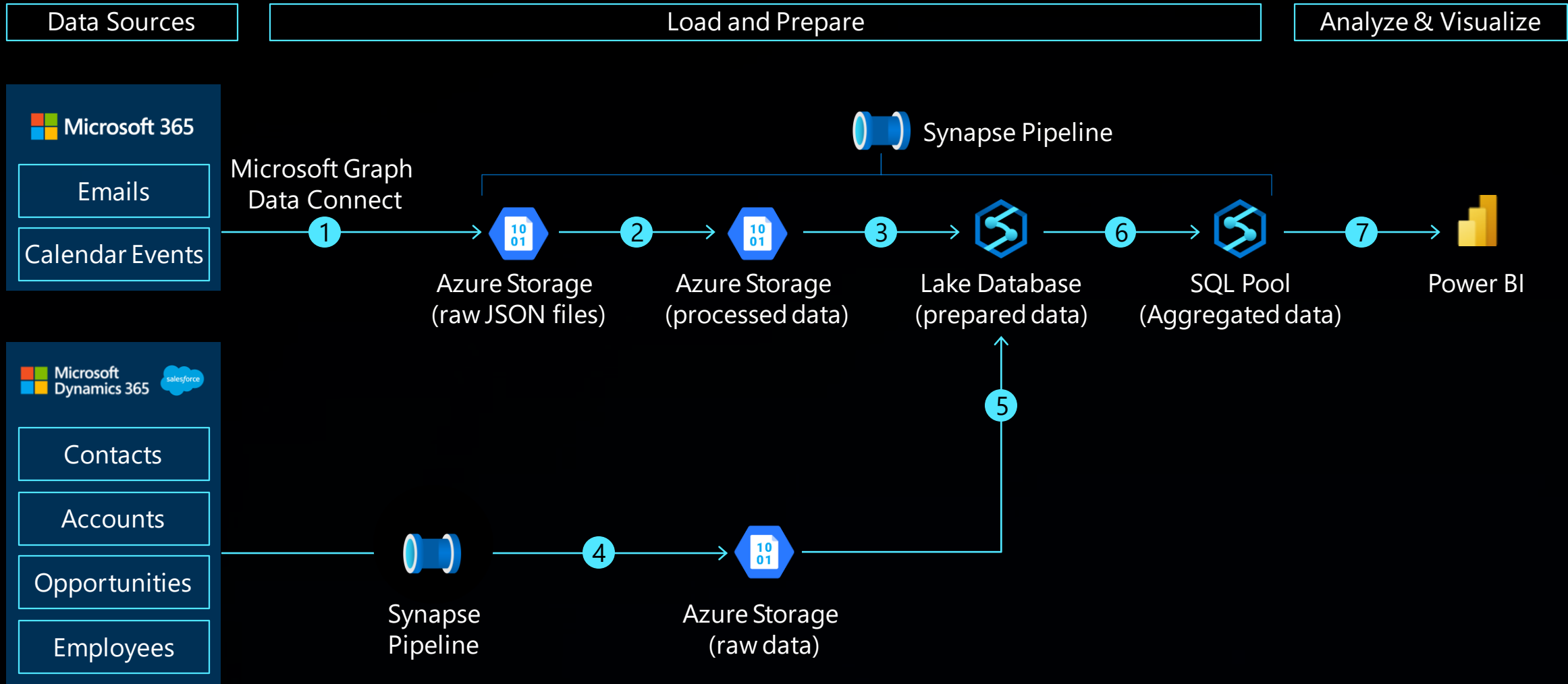
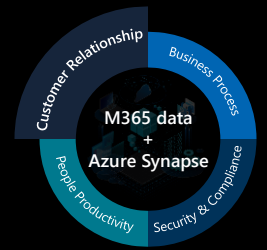


External data
& LOB apps

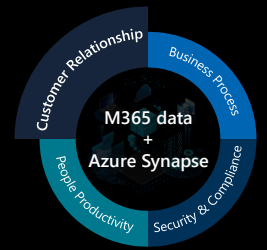


Azure
Synapse

Architecture Overview: Relationship Mesh

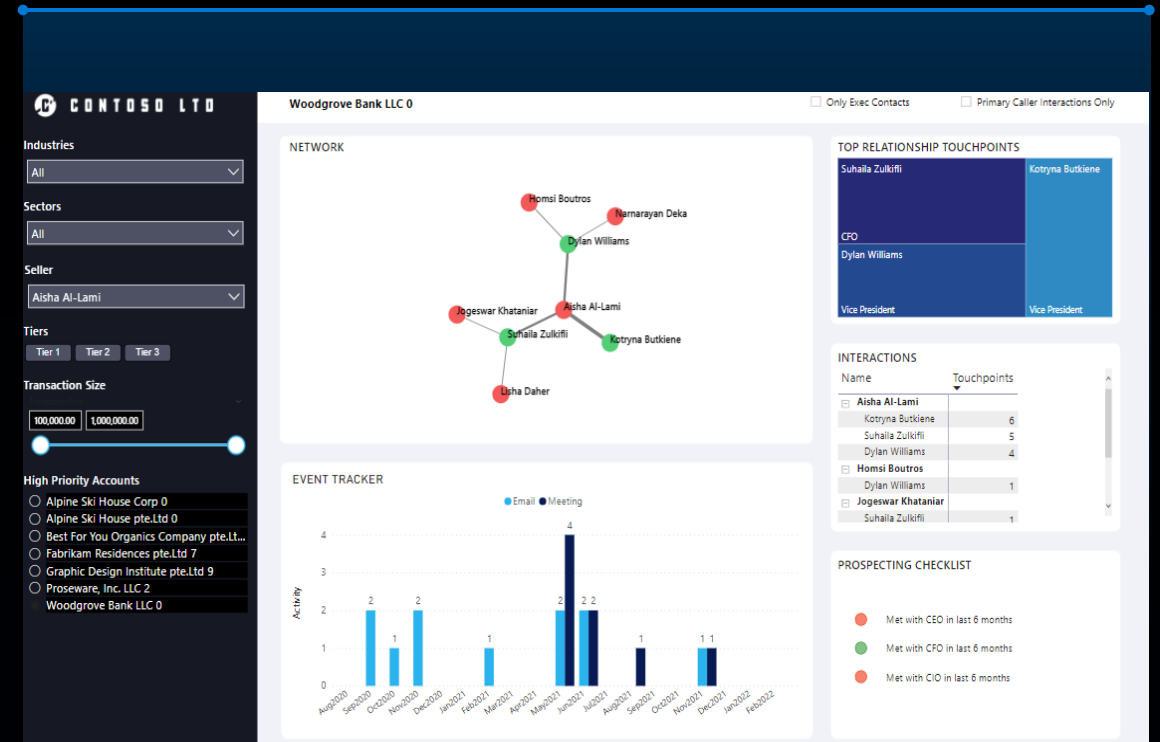
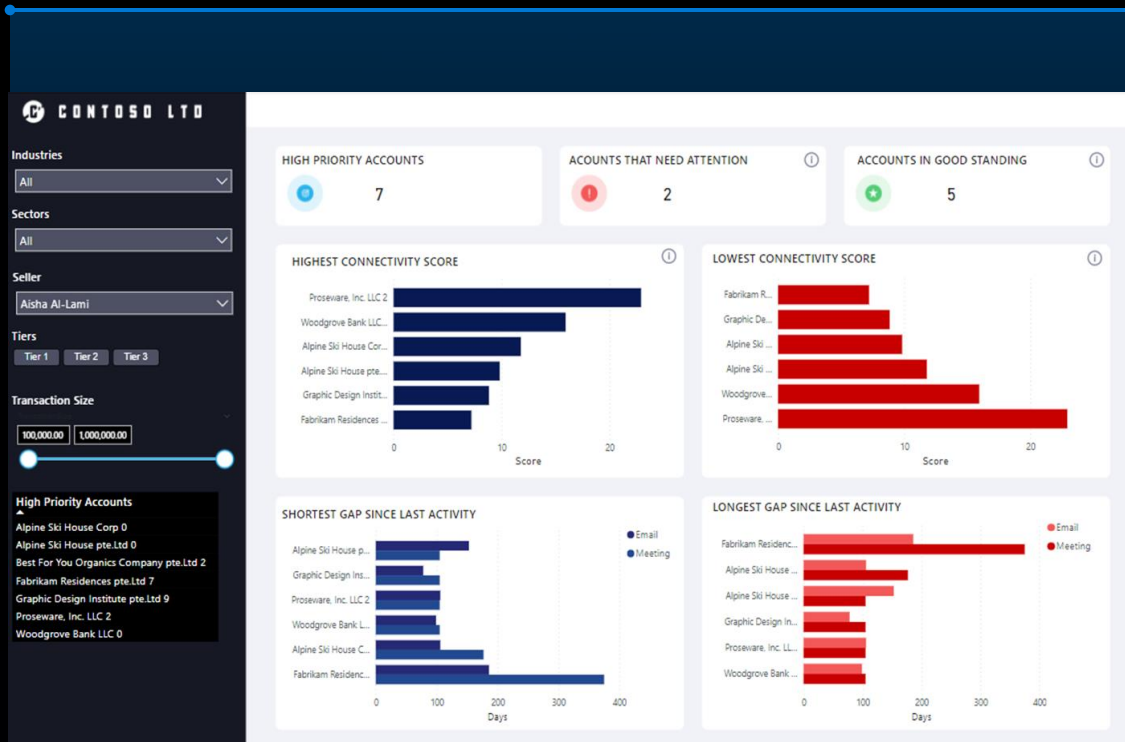


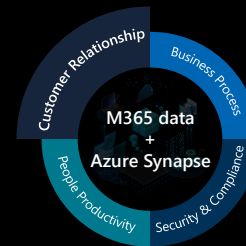
Relationship Mesh Solution Accelerator



Prepackaged business logic: Calculates a connectivity score between your sellers and customer contacts based on CRM, email communication and meetings data

Prebuilt Power BI dashboard to include actionable insights both at organization level and at an individual account level





Relationship Mesh Solution Accelerator

How it works

1

Deploy the Solution Accelerator

- Set up Azure Synapse Analytics
- Create Office 365 connections and pipeline
- Create Salesforce connection and pipeline

2

Upload the sample data and configure the solution

- Upload sample datasets (or connect to your Office 365 tenant and CRM systems)
- Create/upload notebooks for data processing
- Run data processing pipelines

3

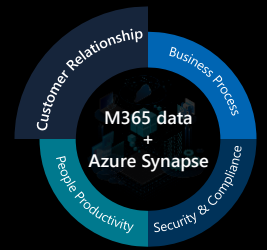
Create the Power BI dashboard for summary and detailed reporting

- Update the connections in Power BI dashboard provided as part of SA
- Refresh all data in the dashboards

4

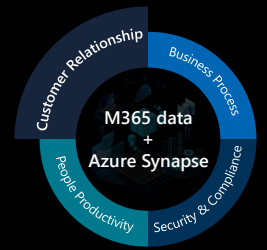
Review the insights with stakeholders and adjust as needed

- Identify the target audience and roles within the business team
- Review and add new slicers or charts
- Update the Connectivity Score formula as needed



Customer 360

Combine the power of Azure Synapse with Dynamics 365 Customer Insights and Microsoft 365 to build a comprehensive view of the customers experience



Today's Challenges



Managing customer data from multiple sources and lacking a unified Customer 360 view

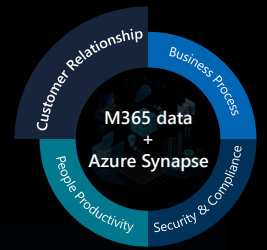


Constantly increasing their number of interaction channels and touchpoints with customers



Out of date, inaccurate, and fragmented sales interaction data makes it impossible to coordinate with peers across the organization

Customer 360 Solution



Build a **comprehensive customer view** and provide the best customer experience possible



Identify and segment your high value and at-risk customers



Enable marketing to run **effective campaigns** and promotions on "warm" leads



Boost **customer retention** and satisfaction

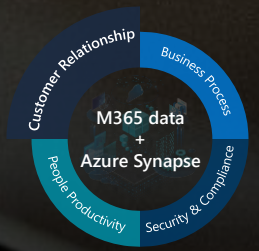


BENEFITS

- Increase customer retention and satisfaction
- Share data and collaborate cross functionally
- Trust the data in your system and forecast with confidence

Case Study: Customer 360

Media Conglomerate Leverages Customer Interaction Data to develop new offers



BUSINESS CHALLENGE

- Customers engage with businesses numerous modalities (web, in person, app, phone, etc.)
- Inability to unify customer records
- Ability to develop new products/promos/features based on customer feedback was limited

SOLUTION

- This solution accelerator showcases the cross-solution integration of Azure Synapse Analytics, Graph Data Connect and Dynamics 365 Customer Insights
- [Link to Solution Accelerator](#)
- By combining the power of Azure Synapse Analytics with Dynamics 365 Customer Insights, we can build a comprehensive view of customers

RESULT

- Improved customer insights include:
- Immediate customer feedback to quickly to address CSAT
 - Development of new promos/offers based on data from bot chats
 - Improved customer engagement
- E.g., Based on bot interactions, Marketing was able to capture, harness customer asks to develop new promos/offers to meet customer demand

SOLUTION ELEMENTS



Microsoft Graph Data Connect



Microsoft 365

- Emails, Chats
- Bots D365

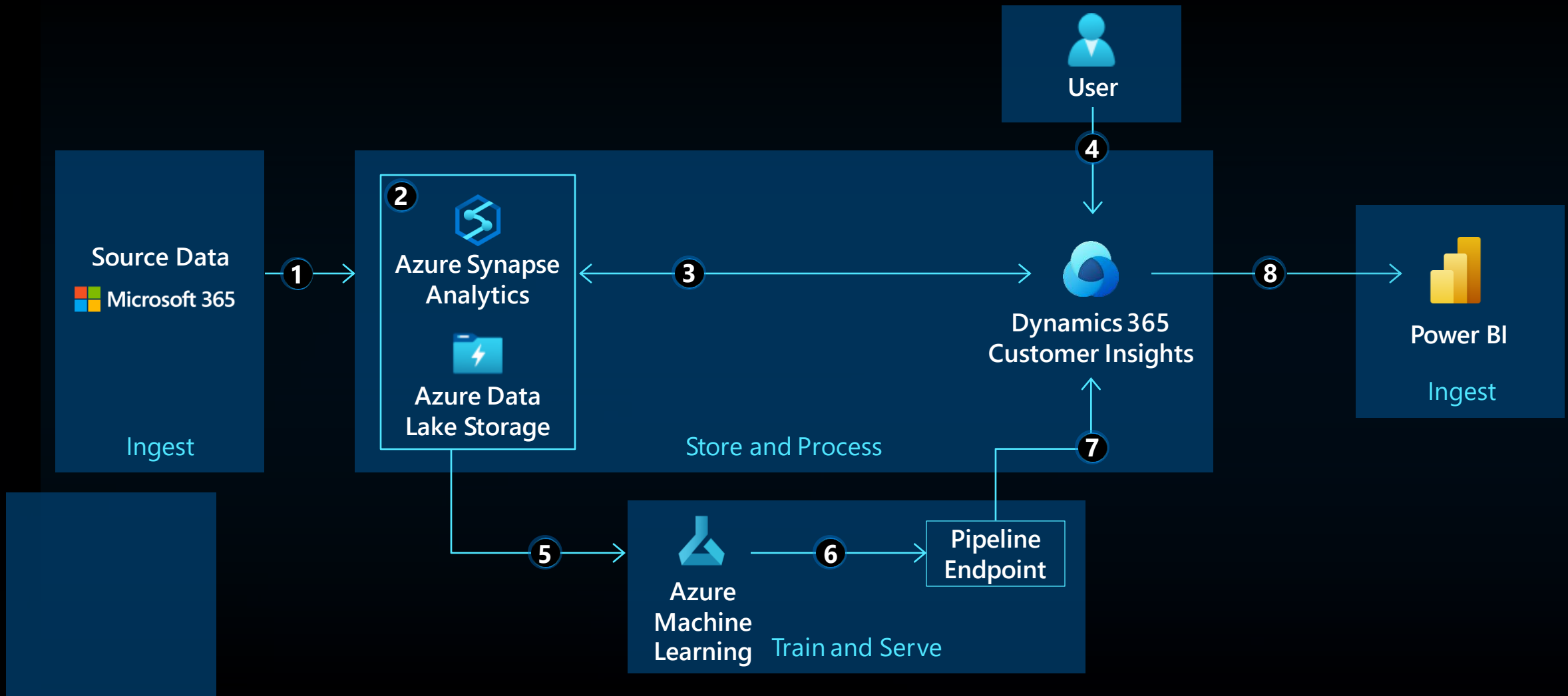
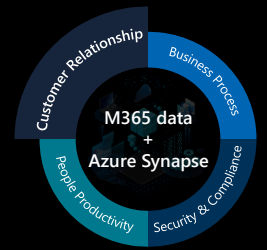


External data & LOB apps

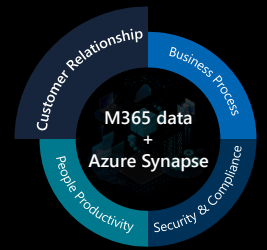


Azure Synapse

Architecture Overview: Customer 360



Customer 360 Solution Accelerator



Prepackaged business logic: Calculates customer activity and activity in a detailed timeline

Prebuilt Power BI dashboard to includes actionable insights both at organization level and at an individual account level

Customer Profile: Kartika Indarwati
 Washington, DC, United States
 Last activity: 6/1/2021

Activity timeline
 6 leases, 104 payments, 87 workorders

CSAT (Last updated 22 days ago): 80
CLTV (Last updated 22 days ago): 25.0K

Interest affinity for customers like Kartika Indarwati
 Concerts & Music Festivals - High
 Fitness - Very high
 Dining & Nightlife - Very high

Brand affinity for customers like Kartika Indarwati
 Music - High
 Starbucks - Very high
 Netflix - Very high

Customer Profile: Chrysostomos Fotopoulos
 Male
 Customer since 2/2015

Brands
 Music, Xbox

Payments Over Time
 2018, 2019, 2020, 2021

Interests
 Fitness: 23.86%, Video: 40.1%, Dining & Ni...: 26.04%

Engagement Score
 (Blank)

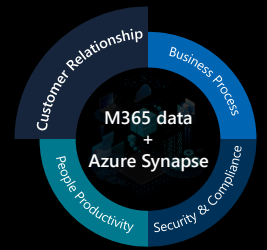
Timeline (41 activities)
 3 leases, 34 payments, 4 workorders

- workorders - 4/12/22: Filter Replacement
- workorders - 2/19/22: Light Bulbs
- workorders - 1/16/22: Walls
- workorders - 12/9/21: Windows
- leases - 12/1/21: Renewal
- payments - 9/1/21: 1000.0
- payments - 8/1/21: 1000.0



Customer 360 Accelerator

How it works



1

Deploy the Solution Accelerator

- Set up Azure Synapse Analytics and Customer Insights
- Create Office 365 connections and pipeline
- Create Salesforce connection and pipeline

2

Upload the sample data and configure the solution

- Upload datasets (or use the sample property management dataset provided as part of SA)
- Unify customers and create Relationships, Activities, Segments and Intelligence
- Create/upload notebooks for training a machine learning model and integrate the custom ML models into CI

3

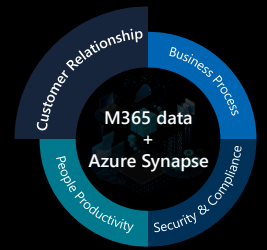
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Review the insights with stakeholders and adjust as needed

- Identify the target audience and roles within the business team
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Customer Complaint Management

Consolidate customer complaints from email, chat, social media. Intelligently classify, and surface to the correct support agent for quick resolution

Today's Challenges



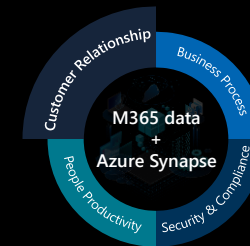
Complaints coming from different channels are often missed or lack context leading to delayed responses and customer frustration



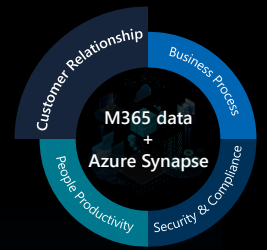
General support agents are critical to the business but are also valuable, overtaxed resources. Lack of compliant classification means inability to specialize leading to wasted time



Lack of a complaint queue can lead to disorganization, redundancy, and a slowdown in the rate of responses



Customer Complaint Mgt. Solution



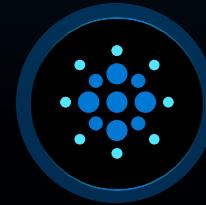
Build an end-to-end macro-ingestion customer complaint management solution



Use AI to intelligently classify, sort, and tier/prioritize complaints



Ingests complaints from multiple sources, both traditional and modern



Compare and contrast current complaints to similar past complaints

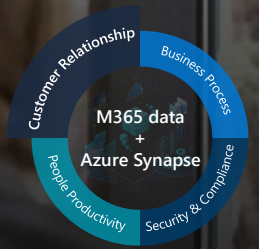


BENEFITS

- Improved customer satisfaction and reduced response times
- Greater support agent efficiency
- Visibility into all your complaints in a single, unified platform

Case Study: Customer Complaint Mgt.

Restraunter / Hospitality Chain uses MGDC + Azure Synapse + Power Platform to resolve real time customer feedback.



BUSINESS CHALLENGE

- It is becoming increasingly difficult with the way companies are increasing their number of interaction channels and touchpoints with customers
- More so, customer feedback occurs online, in social media, and other social platforms via customer reviews and likes
- How to proactively address the complaints and the volume in increasingly difficult

SOLUTION

- Azure Synapse Analytics can help bring all customer data, interactions data and complaints data into a unified data platform ([Learn More](#))
 - AI powered text classification can help classify the complaints into the right category and route them to support team for faster resolution
 - Power App can help the support team access their complaint queue and respond quickly

RESULT

- Customer complaints management improved:
- Lowered time to response
 - Clear classification of escalations
 - Overall improvement in Customer Satisfaction Score (CSAT)

SOLUTION ELEMENTS



Microsoft
Graph Data
Connect



Microsoft 365

- Sent emails
- Attachments
- Contacts

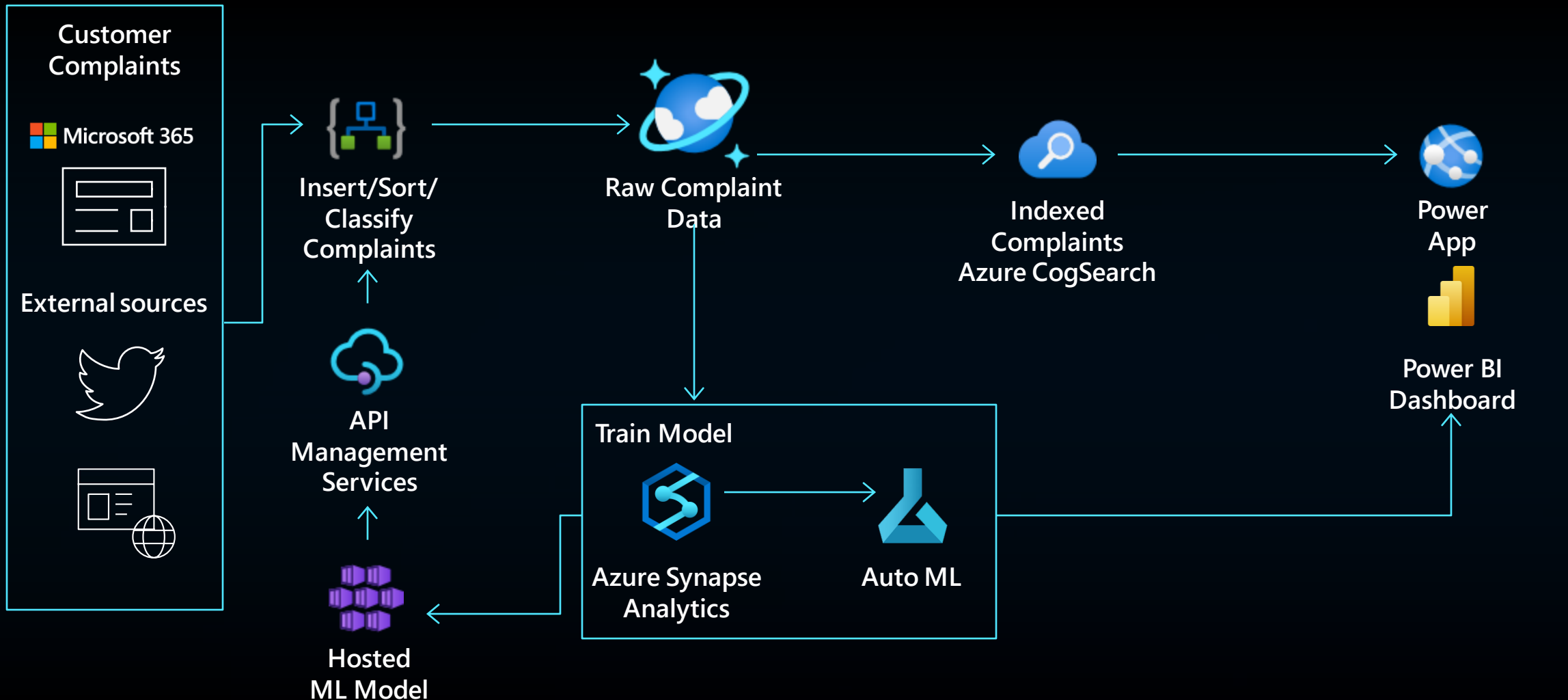
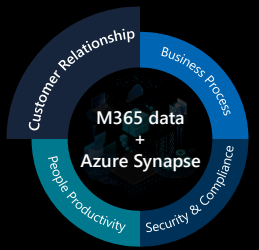


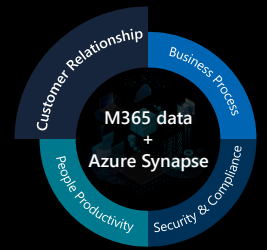
External data
& LOB apps



Azure
Synapse

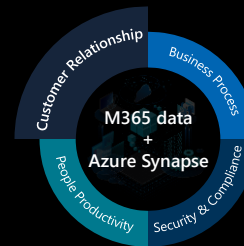
Architecture Overview: Customer Complaint Mgt.





Conversation Lineage

Integrate Microsoft 365 email conversations with CRM account information to create a single view with customer sentiment analysis



Today's Challenges



Unclear if internal email campaigns are effective in disseminating information

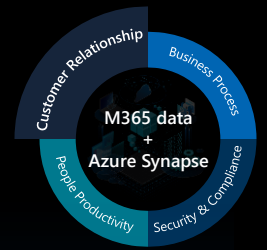


Bad practices such as routinely oversharing or late night/weekend communications



Unable to determine flow of communication and the parties involved to resolve issues

Conversation Lineage Solution



Track emails from campaign (read through rate, click through rate)



Identify and root out negative behaviors by setting email rules that govern the patterns of communication



Determine the value each party is bring to the chain of interaction (reduce redirecting)



Measure changes in an organization's communication patterns



BENEFITS

- Leverage the power of conversation patterns to optimize efficient routing
- Craft compelling internal email campaigns with proven results
- Identify and eliminate bad communication practices

Case Study: Conversation Lineage

European Bank Leverages M365 + Synapse to move from Digital Laggard to Digital Native



BUSINESS CHALLENGE

- The pandemic required the organization to change business processes and adopt new technologies
- Many departments required training but there was no effective way to measure progress on new processes
- As a result, morale was on the decline

SOLUTION

- Leveraging M365 MGDC, Azure the organization was able to effectively measure Teams usage including new features such as Whiteboarding, Meeting transcripts, Meeting effectiveness, employee/manager engagement and develop KPIs to measure change
- [Link to Solution Accelerator](#)

RESULT

- Quickly see progress of adopting new technologies by department
- Offer training courses
- Change organizational behavior

SOLUTION ELEMENTS



Microsoft
Graph Data
Connect



Microsoft 365

- Emails, Teams, Calendar
- Contacts

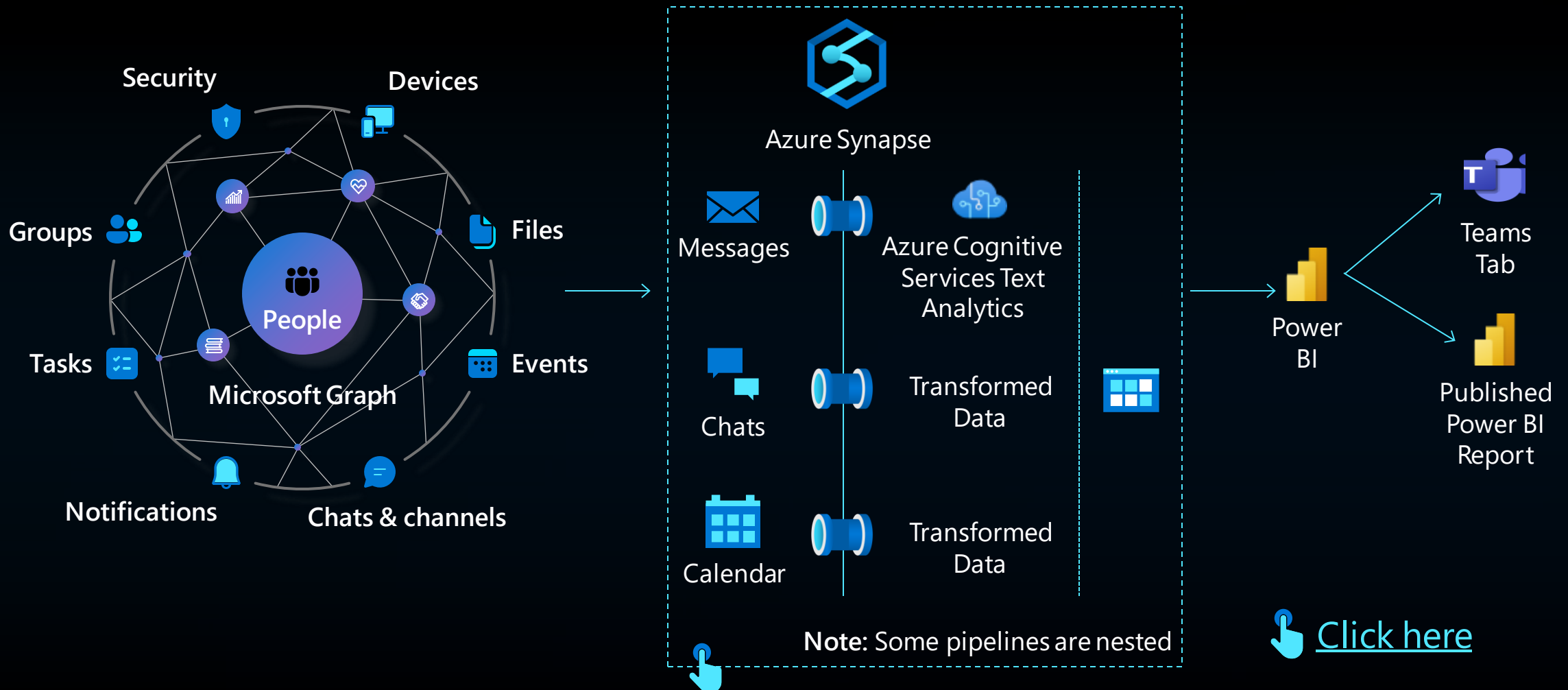
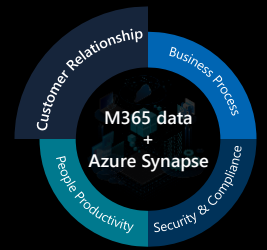


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& LOB apps

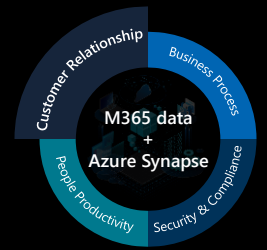


Azure
Synapse

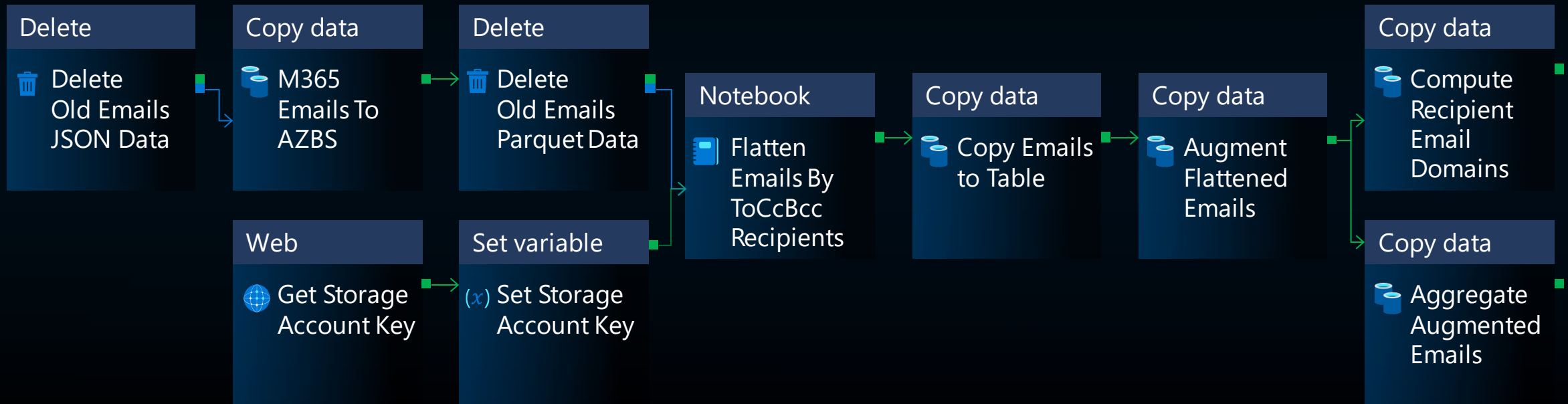
Architecture Overview: Conversation Lineage

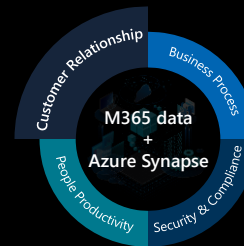


Architecture Overview: Conversation Lineage



 [Click here](#)





Next steps ...

- Learn more about how to ingest M365 data in Azure Synapse ([Link](#))
- Align with your business stakeholders for sponsorship, expectations and budget
- Start with business case to develop scenario/use case and supporting solution design



...how Microsoft can help you

- Request MTC Data & AI Architecture Design Session or Rapid Prototype (optional)
- Work with your DAI CSA to do a pilot/ Solution Accelerator (optional)