

A background image showing a group of people in a meeting room, looking at a large screen displaying data. The image is overlaid with a teal gradient and some faint geometric patterns.

# Customer Insights 4-Week Workshop

## Summary

In this 4-week engagement, Avtex transforms what you know about your customers into an actionable 360° profile and puts you on a path for an elevated Customer Experience strategy. Not only will you get started unifying disparate data sources, but you'll walk away with a fully functioning platform powered by Microsoft that will surface actionable insights from high-value customer segments.

## Deliverables

- Data discovery, readiness evaluation, and prioritization
- Sandbox and Production environments set up
- Data sources defined and best practices provided for each
- Ingestion of three data sources
- Walkthrough of Unify process
- Enrichment run, if applicable
- Training on segmentation
- Power BI connected to instance
- Summary of next steps

## 4-Week Workshop Description

### Harness your data sources

Utilizing the Common Data Model, your data sources are mapped into a standard and extensible schema. With Microsoft's proprietary built-in machine learning capabilities, we will match sources on a variety of critical dimensions and find the hidden links that uncover each unique customer transforming your data into a full 360° profile. This will lead your organization on a path to creating searchable, filterable index of your customers and actionable dashboards built off Power BI.

### Improved customer experience

Using Microsoft Flow, PowerApp Connectors, and Power BI dashboards we will help drive growth within your customer base by allowing you to better understand customer motivations and discover opportunities that were previously hidden. Our team of experienced Data and AI professionals will also help in designing a complete end to end solution that will allow you to maximize your customer data and empower your employees to drive better customer experiences.

### Plan for what's next

With a set of robust Customer 360° profiles built, the most important step is to determine how to use this data. Our experts provide information on building segments that match your needs. We then connect to the Customer Insights platform with Power BI to enable you to explore your customer profiles even further. Our Data and AI team then provides a brief roadmap for unlocking even more value, through machine learning and AI-powered insights.