



Microsoft
Partner

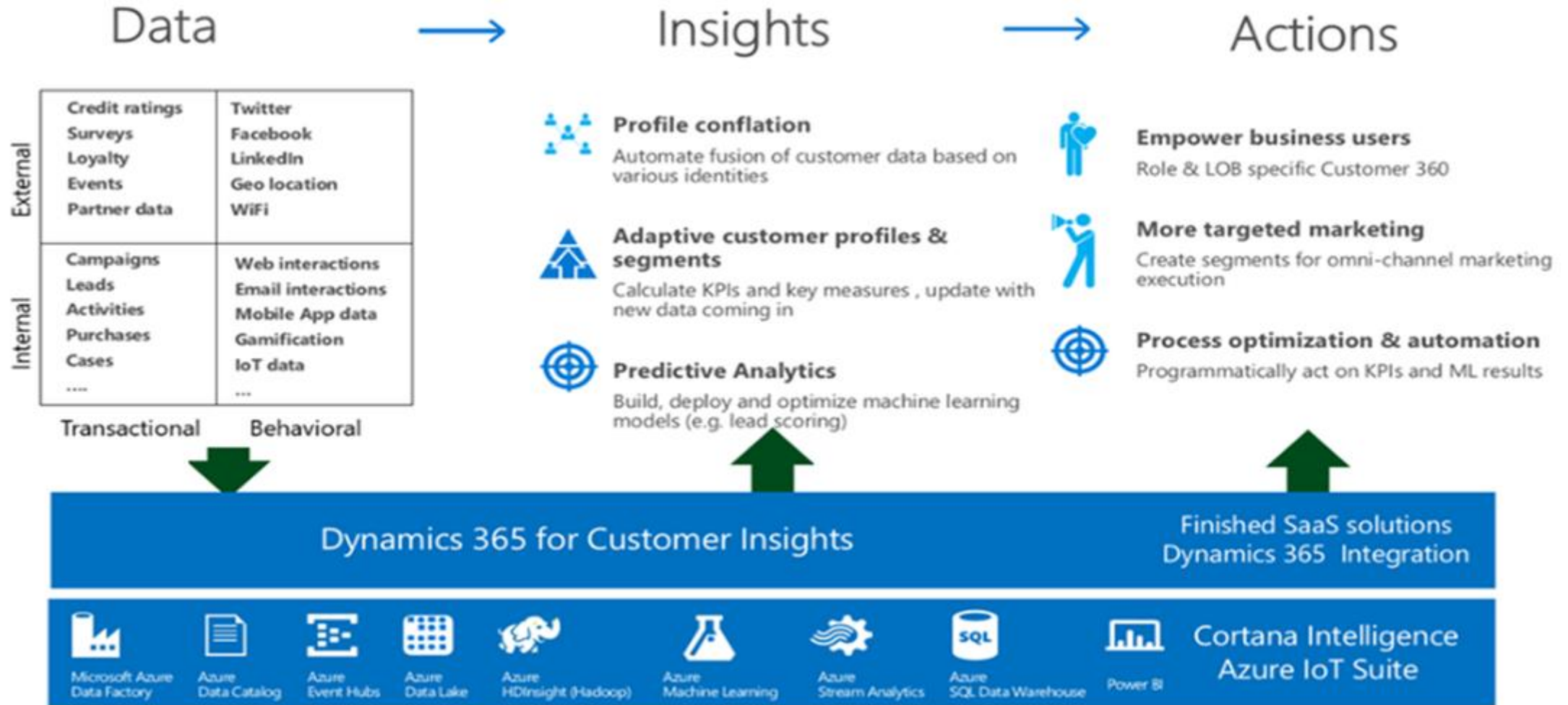


- Gold Application Development
- Gold Cloud Platform
- Gold Cloud Productivity
- Gold Data Analytics
- Gold Datacenter
- Gold Security
- Gold Collaboration and Content
- Gold DevOps

MS Dynamics 365 Customer Insights



Dynamics 365 Customer Insights



Hexaware Customer Insight – Implementation

Hexaware, in collaboration with Microsoft, offers quick customer insights implementation for clients to get holistic view of their customer, unlock insights and enable proactive and predictive services.

Step 1 Assessment

Define the goals and objectives for the Customer Insight implementation
Define the business case and ROI
Understand the customer environment

Quick discovery Toolkit

Step 2 Configure

Setup the Insights instance for Dynamics 365 and other 3rd party data Setup

**Insight Toolkit
Custom Connectors**

Step 3 Enable

Configure visualizations - Customer 360 view with OOB and Custom Insight cards, reports and dashboards

**Custom Insight Action Cards
PowerApps Components**

Step 4 Proactive Actions

Assign role based next best actions / playbooks
Enable insight driven engagement with best practices

**Role based Action
Framework/ Playbooks**

Customer Insights key features & Outcomes

Key Outcomes

1. Improving the Funnel quality
2. Implement Lead scoring
3. Leverage Insights to determine nurture campaign

1. Improve Close Rates
2. Identify activities that increase probability to close
3. Predict Forecasting

1. Predict Customer Churn
2. Customer CSAT
3. Predict Cross-Sell / Up-sell
4. Predict Next Service Call

Implementation

Marketing

1. Prospect Segmentation
2. Targeted Campaigns
3. Lead Generation
4. Lead Assignment
5. Lead Scoring

Sales

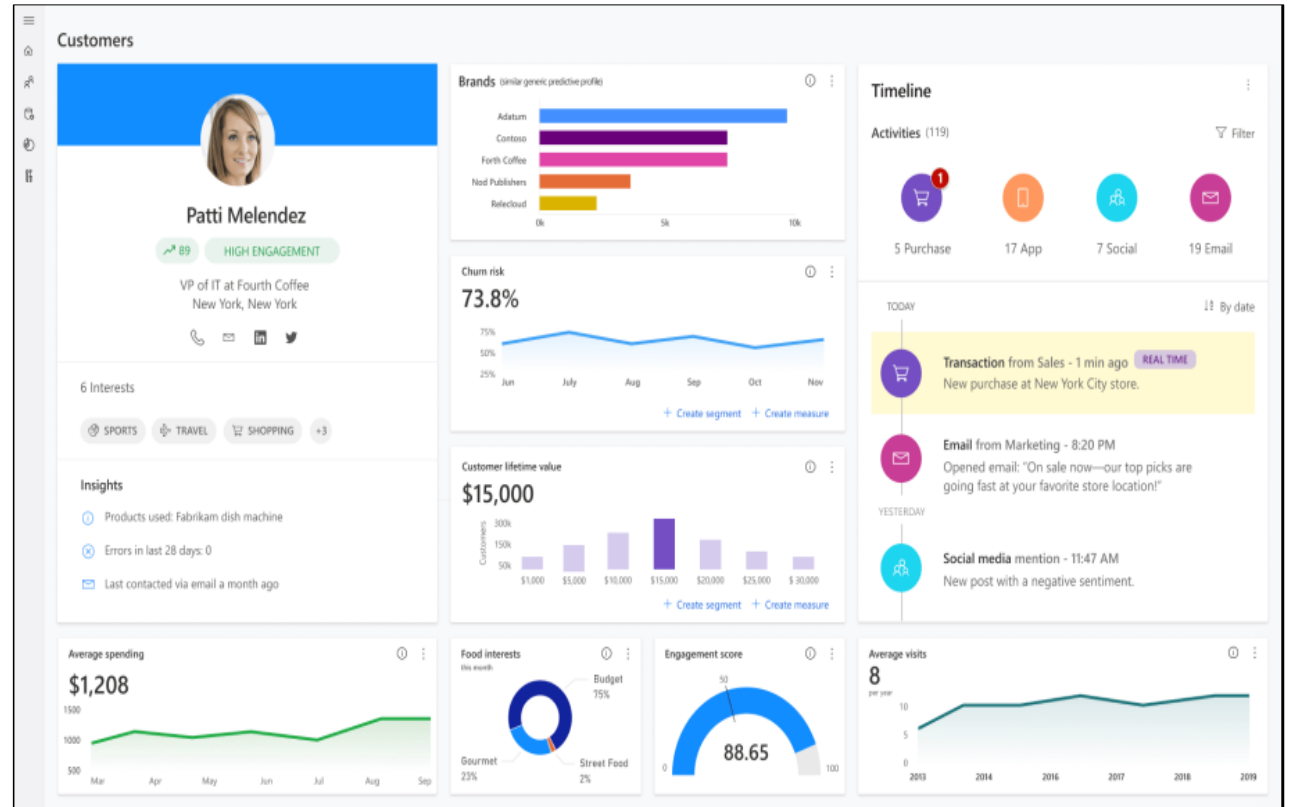
1. Customer Segmentation
2. Opportunity predictive Scoring
3. Next best Actions
4. Cross-sell / Up-sell

Customer Service

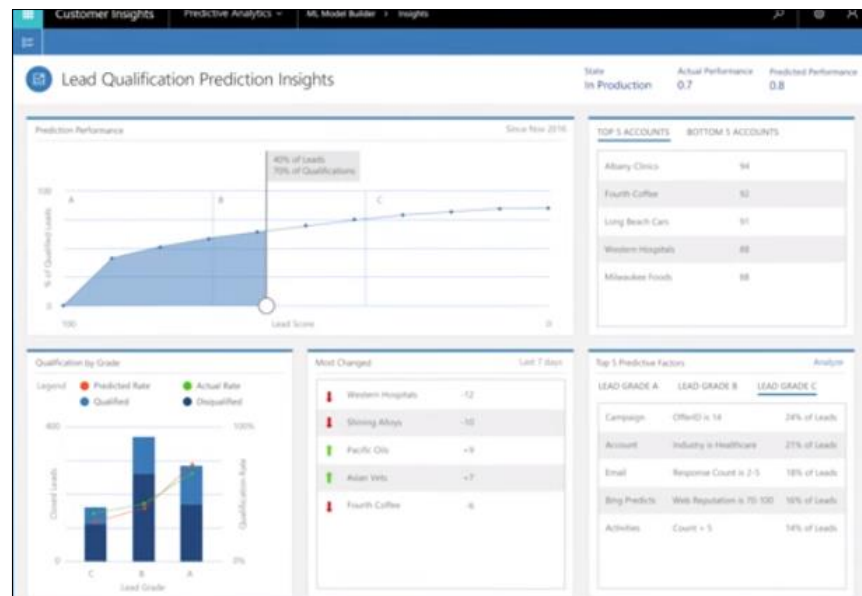
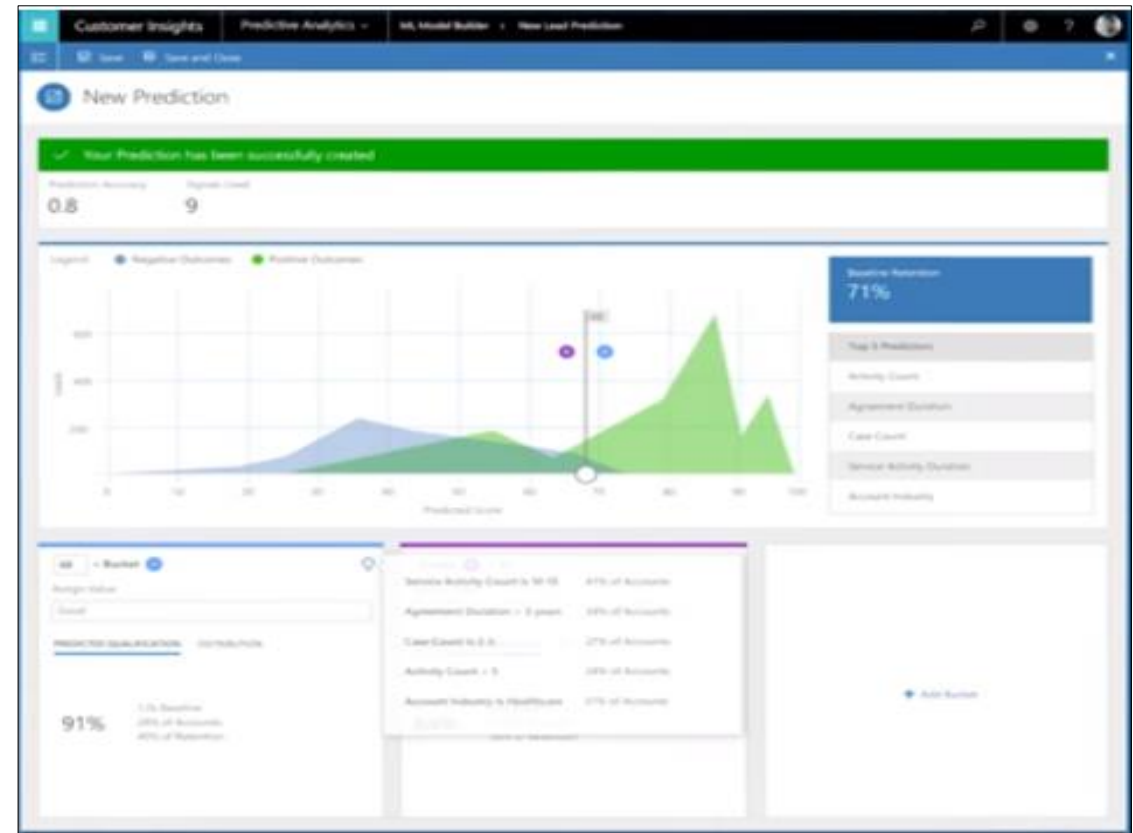
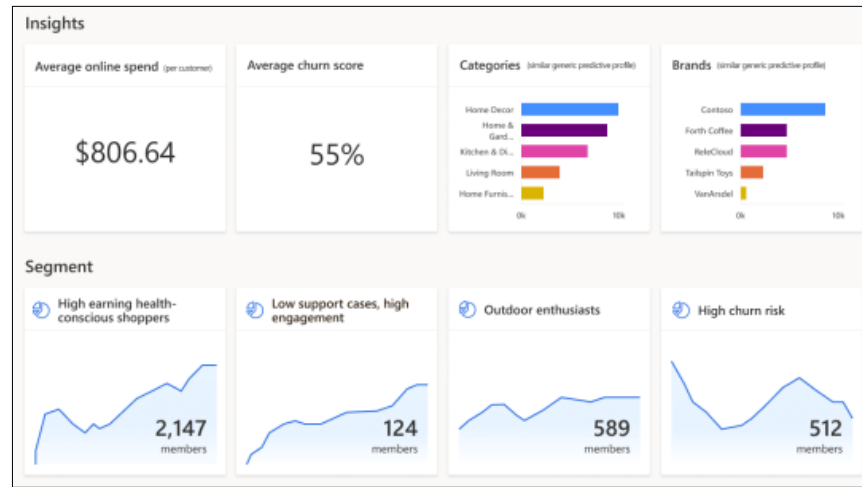
1. Proactive services and support
2. Resource Optimization
3. Omni-channel

Customer - 360 Degree View, Personalized Journey & Communications

360° View - Prospect and Customer



Insights and Prediction Visualization - Action Cards / Reports / Dashboards



Set Action Framework - Role based Activity / Playbook Assignment

This screenshot shows the 'PLAYBOOK' interface for a 'Playbook Template Example'. The status is 'Active' and the result is 'In Progress', with the owner listed as 'Obi Ghafoor'. The 'Summary' tab is active, displaying 'Playbook Information' with a name of 'Playbook Template Example'. It shows 1 total activity, 1 completed activity (highlighted with a green circle), and an estimated close date of 29/12/2018. The activity is regarding 'Expressed interest in A. Datum X line of printers'. Below this, 'Template Information' shows the template name 'Playbook Template Example'. The 'Playbook activities' table lists one activity: 'Appointment - Playbook Te...' with a status of 'Completed', owned by 'Obi Ghafoor', and a high priority. A 'Timeline' section is also visible, showing a filter by record type and a specific activity 'Appointment - Playbook Example' on 'TODAY'.

This screenshot shows the 'Sales Manager Review' Playbook template interface. The status is 'Published' and the publisher is 'Archana Raina'. The 'Summary' tab is active, displaying 'Information' for the 'Sales Manager Review' category, which is part of the 'Sales Manager Playbook'. The track progress is set to 'Yes'. The 'Playbook activities' table lists two tasks: 'Review Customer with Churn Risk' (created 5/18/2020 11:57 AM) and 'Review top 10 Opportunities' (created 5/18/2020 11:56 AM). A 'Timeline' section is also present, with a search bar and a note field. At the bottom, a 'Select record types that this playbook applies to' dialog is open, showing 'Opportunity' selected in the 'Available' list and 'Account' and 'Contact' in the 'Selected' list.

Why Hexaware?



Our Industry Accelerators



Digital Bank

- Data Model as per BIAN (Banking Industry Architecture Network)
- Customer Onboarding
- KYC
- Mortgage
- Deposit Handling
- Referrals
- Payments
- Insights



Digital Insurance

- Agency Management
- Customer 360
- Agency 360
- Advisory
- Quote
- Claims
- Insights



Unified Patient Engagement

- Patient 360
- HCP 360
- Manage Care
- Patient Self Care
- Patient Driven business models



Digital University

- Contactless Registrations
- Referral Management
- Student Services
- Event Management
- Corporate Engagement
- Alumni & Donor Engagement

Industry-standard data models that enables organizations to rapidly build intelligent, data-driven services solutions across lines of business, accelerating time to value for a range of competitive customer scenarios.

Accelerators, Tools & Templates

Data Migration Toolkit

Business App Solutions

Power App Components Library

Insight based Solutions



Thank you

Innovative Services



Passionate Employees



Delighted Customers

