

Dynamics 365 Customer Insights: Personalization That Performs

Solutions for Success Education Series

Solutions for **Success**



POINT ALLIANCE

Agenda

- About Point Alliance
- Overview Customer Insights – Journey
- Journey Orchestration
- Segmentation
- Integration to Microsoft ecosystem
- Demo



Point Alliance

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Point Alliance

- Microsoft Solutions Partner
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Customer Insights Journey

What is Customer Insights – Journey?

Microsoft's flagship real-time marketing automation and customer journey orchestration platform — combining marketing automation, AI, and CRM data within a single unified platform.

Real-Time

Trigger journeys from live customer events the moment they occur.

Cross-Channel

Email, SMS, push, and custom channels orchestrated together.

AI-Native

Copilot and autonomous agents embedded across every workflow.

Unified Data

Single unified data, across CRM, ERP, web, email, and events.

Orchestration & Unified Profiles

1

Customer Journey Orchestration

- Trigger-based journeys respond to real-time customer actions
- Triggered by events: email opens, form submits, page views, CRM stage changes
- Segment-based journeys target defined audiences on schedule
- Automated workflows

2

Unified Customer Profiles

- Integrates CRM (D365 Sales), ERP, eCommerce, web, email, surveys, events
- Powers deep segmentation
- Contact Consent Compliance

Multi-Channel Engagement & Event Planning

3

Multi-Channel Engagement

- Email, SMS, push notifications, and custom channels
- AI-driven run-time channel optimization per individual
- Maximizes engagement and conversion rates
- Unified orchestration across all touchpoints

4

Event Planning

- Live events and webinars.
- Venue Management
- Session Tracking
- Guest Logistics

Three ways to orchestrate engagement

Journey Type	Description	Best For
Trigger-Based	Launches when a customer performs a specific action or a data event occurs in real time.	<i>Real-time event response</i>
Segment-Based	Targets a defined audience group on a one-time or recurring schedule.	<i>Scheduled audience targeting</i>
API-Driven	Programmatically create and manage journeys via the Journey API for enterprise-level integration.	<i>Enterprise integration</i>

Journeys delivers value

01

Welcome Series

Onboard new customers with personalized email / SMS or other channels.

02

Event & Webinar Marketing

Register attendees, send reminders, and follow up post-event.

03

Upsell / Cross-Sell Products

Target existing customers based on purchase history and behaviour.

04

Lead / Sales Engagements

Lead nurturing to automatic qualification to sales.

Segmentation & Targeting

200K+

Static Segments

Define audiences by groups of traits
— i.e.: location, industry,

Real-Time

Behavioral

Group customers by actions and
decisions

AI-Driven

Co-Pilot

Query Assist – Using Natural
Language

Native integration across Microsoft

Customer Insights – Journeys integrates natively with the broader Microsoft ecosystem to provide a seamless, end-to-end customer engagement platform.

1

Customer Insights - Data

Unified profiles and AI-powered segmentation that feed every journey.

2

Dynamics 365 Sales

Customer Management

3

Power Platform

Extend with Power Automate flows and Copilot Studio agents.

4

Azure

Enterprise data pipelines, AI models, and scalable cloud infrastructure.

End-to-end data flow

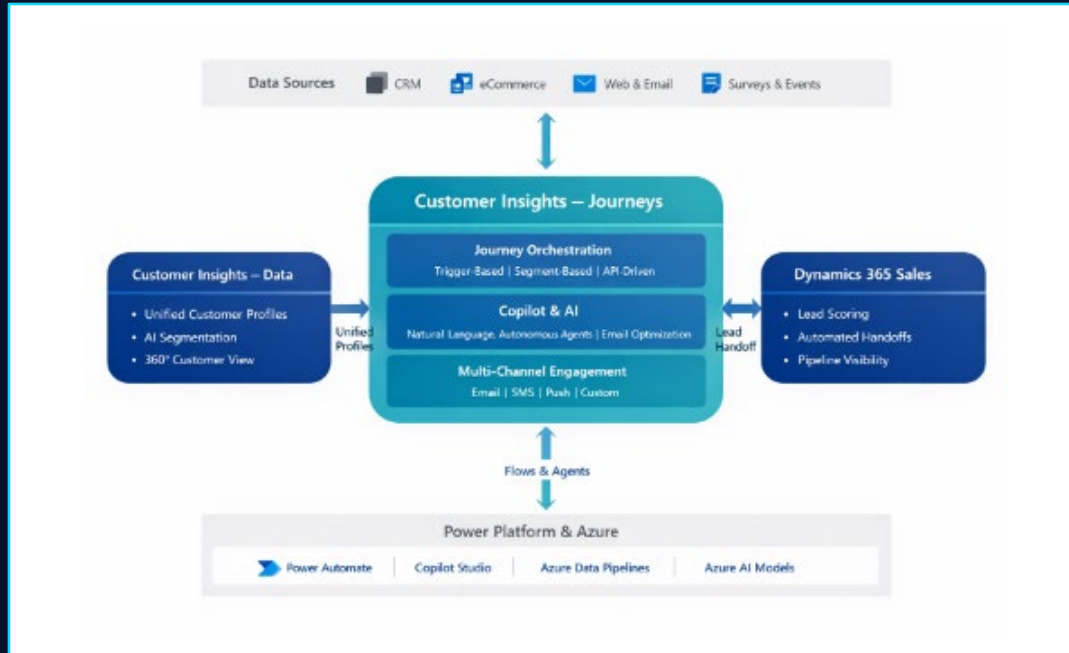


Figure 1

D365 Customer Insights – Journeys Architecture Overview

- Data ingested from CRM, ERP, eCommerce, web, and surveys
- Profiles feed the Journeys orchestration hub
- Native integrations to Sales, Power Platform, and Azure
- Unified into rich profiles via Customer Insights – Data

Customer Insights Journey Demo

Demo Use Case

Toronto User Group AI Ad-hoc huddle happening in Toronto.

Channels

- Registration Form
- Create email content invitation

Segmentation

- Create audience

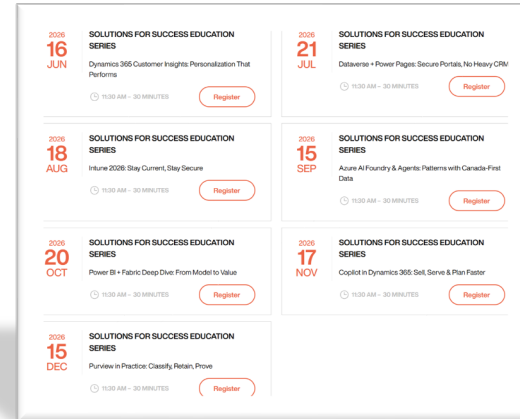
Journey

- Send communication using email channel.

Upcoming Events

Upcoming S4S Webinars

- Third Tuesday of Each Month
- pointalliance.com/events



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