



Customer Insights Quick-Start Workshop

Summary

One day is all it takes to start implementing Microsoft's latest game-changing platform for unifying data sources. Using real data, 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.

Deliverables

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

Full Day Workshop Description

Discover your data

During the full day workshop, our experts help you examine your objectives, and assess the available sources to provide recommendations for connectivity. In this stage, you'll build an understanding of how the Customer Insights platform works, what to connect to, and how to select the appropriate information.

Connect with ease

With your real data available, we'll use Customer Insight's native connectors to start the ingestion process for your data. Once complete, we'll move into the Unify process, where data is mapped to Microsoft's Common Data Model, matched against other data sources using embedded Machine Learning algorithms and merged to complete the profile of a customer that empowers your employees to drive a better customer experience. If the data ingested is robust enough, we enrich by drawing from the Microsoft Graph.

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. As a wrap-up, we'll explore additional extensibility options including Flow and PowerApps, and how to expand on this intelligence to maintain your momentum.

Contact

Paul Murray, Director, US Health and Life Sciences | Avtex
e: pmurray@avtex.com d: 615-334-0127