

Launchpad for EZghdcVabZY Banking

Deliver hyper-personalized, memorable experiences powered by Microsoft Cloud for Financial Services, Dynamics 365 Customer Insights and Marketing.

Overview

Your customers expect every interaction to be easy, personalized and secure. For over 45 years, Avtex has been helping build customer experiences (CX) that drive loyalty, retention, and sales.

Powered by Microsoft Cloud for Financial Services, Dynamics 365 Marketing and Customer Insights, Avtex is helping businesses provide frictionless CX designed for human experiences.

We can help your business:

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- ▽ Proactively advise customers on their financial health, including life moments
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Summary

Personalization is hard. Avtex makes it easier.

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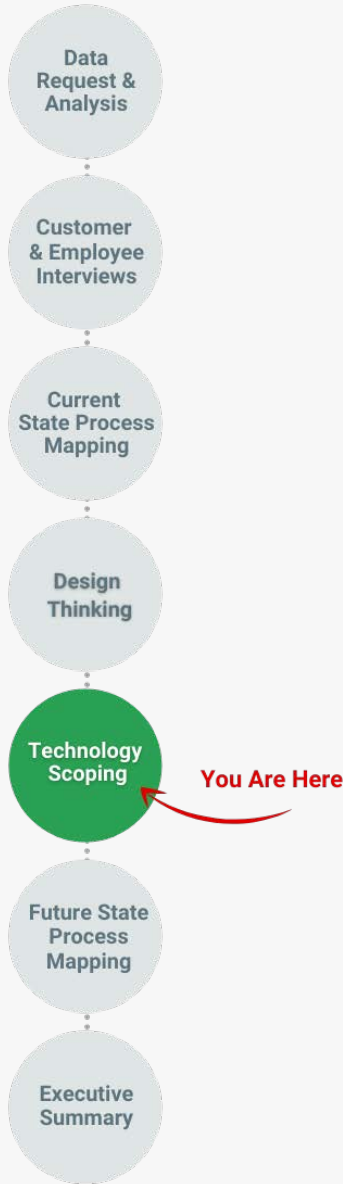
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Avtex Customer Experience Transformation with Launchpad for Personalized Banking



12 Week Proof of Concept Agenda

Week 1/2

- Determine use cases for segmenting and personalized targeting
- Review data sources for profiles and activities
- Gather requirements for marketing outcomes and journeys
- Configure Sandbox and Production environments
- Import Customer and activity data sources into Dynamics 365 Customer Insights

Week 3/4

- Unify data sources into a customer profile in Customer Insights
- Base configuration of Dynamics 365 Marketing
- Setup Contacts, Accounts and Leads for Marketing

Week 5/6

- Design custom Marketing entities
- Create e-mail templates, Landing Pages and forms
- Create activities, relationships, indexes and measures in Customer Insights

Week 7/8

- Configure Customer Insights and Marketing integration
- Implement Marketing journeys
- Analyze unified data to identify segments relevant to your goals

Week 9/10

- Configure out of the box reporting for Marketing
- UAT/Training

Week 11/12

- Go Live, Deployment and Hypercare
- Final executive playback
- Recommendation on next steps



2021 Partner of the Year Winner
 Dynamics 365 Marketing Award
 2021 Partner of the Year Finalist
 Dynamics 365 Customer Insights Award