



# LaunchPad for Personalized Banking



## At-a-Glance

Powered by Microsoft Cloud for Financial Services and Microsoft Dynamics 365 Customer Insights and Marketing, Launchpad for Personalized Banking by TTEC Digital is designed to help you harness your data to inform the easy, personalized, and secure customer experiences (CX) that today's banking customer has come to expect.

## Summary

### Data-driven personalization, simplified

Deliver hyper-personalized, memorable experiences to your customers with real-time insights. Built on Microsoft Cloud for Financial Services and Microsoft Dynamics 365 Customer Insights and Marketing, TTEC Digital's Launchpad for Personalized Banking puts data at the core of your operational strategy, technology decisions, and customer interactions.

## Benefits

With Launchpad for Personalized Banking by TTEC Digital, financial services organizations can unify disparate data to create a complete view of their customers or members, and then target them with personalized marketing communications across channels.

**Track insights and key data points:** Collect data from internal and external sources to paint a 360-degree view of customers. Use real-time KPIs and dashboards to track business goals, journey performance, and content effectiveness.

### Orchestrate real-time customer-led journeys:

Nurture customers based on their interactions across email, mobile, social media, custom channels, and in-person touchpoints. Integrate journeys across sales, service, and marketing to deliver a unified customer experience.

**Deliver personalized interactions:** Engage customers in real time, build brand loyalty faster, personalize the customer experience with AI, and build trust all on a unified, adaptable platform.



# 12-Week Proof of Concept Agenda

## Weeks 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

## Weeks 3-4

- Unify data sources into a customer profile in Customer Insights
- Base configuration of Dynamics 365 Marketing
- Setup contacts, accounts and leads in Marketing

## Weeks 5-6

- Design custom Marketing entities
- Create email templates, landing pages, and forms
- Create activities, relationships, indexes, and measures in Customer Insights

## Weeks 7-8

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

## Weeks 9-10

- Configure out-of-the-box reporting for Marketing
- User acceptance testing and training

## Weeks 11-12

- Go live, deployment, and hypercare
- Final executive playback
- Recommendation on next steps

# TTEC Digital CX Transformation with Launchpad for Personalized Banking



## Request More Information

Ready to turn your customer data into actionable, profitable insights? Connect with one of our CX experts and book a demo of LaunchPad for Personalized Banking.

[Reach out to get started →](#)

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