

# Customer Insights Quick Start

Land customer data from source systems, unify and analyze for insights, and personalized messaging across channels.



## ABOUT RSM's Quick Start Customer Insights Deployment:

Your organization has customer data but it's siloed and actioned across separate systems. To win at online customer relationships, D365 Customer Insights can unify enterprise customer data for personalized messaging across digital channels and direct interactions.

RSM's Quick Start focuses on design of customer data segments, automated triggers, and builds out Customer Insights using data exports from your source systems. Results are demonstrated with a roadmap for real-time data connectivity, AI and third party data enrichment.



## WHAT RSM OFFERS



### Client Discovery

- Business Model
- Strategy/Organization/Capabilities
- Business Requirements
- Business Processes
- Known Issues



### Assess Customer Systems, Data and Touchpoints

- List potential behavioral data segments and automated alert triggers
- Identify end-point message and alert systems
- Determine data sets that represent customer intent



### Design Source Data Extracts, Plan Data Profiles

- Modern technology available through browser and mobile devices
- Built to seamlessly tie in with the Microsoft stack, including Office, SharePoint, and Power BI



### Demonstrate Your Data

- Customer profiles
- Data exports
- Segments and message automation scenarios
- Roadmap to automated data refreshes from source systems

*"64% of customers will buy from socially responsible brands"*

*20% increase in customer preference for contactless touchpoints*

*40% of consumers have increased digital media usage across desktop, mobile, social & streaming"*

- Forbes Magazine

LEARN MORE

RSM US LLP

[digital.rsmus.com](https://digital.rsmus.com)

+1 800 274 3978

