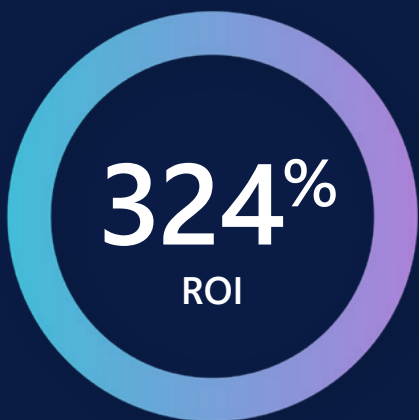


# Strategic Gains for Sales Leaders

Maximizing ROI  
with Dynamics 365  
Customer Insights

In 2024, Microsoft commissioned Forrester Consulting to conduct a Total Economic Impact™ study to examine the potential return on investment (ROI) enterprises may realize by deploying Microsoft Dynamics 365 Customer Insights, a solution that helps sales create connected, personalized customer journeys. These are the results of that study.\*

## Three-year ROI and quick payback realized on an AI-powered solution



< 6-month payback period

### ROI achieved through:

- AI-driven automation and insights
- Enhancing customer engagement
- Increasing revenue per customer
- Optimizing marketing spend

# A tailored customer journey created higher revenue

25%



increase in number of customer journeys developed when using Dynamics 365 Customer Insights

15%



increase in revenue per customer journey

\$5.25M

Three-year, risk-adjusted benefit



Before, we were 100% fragmented. We had no stats or analytics....  
**Now we're able to see where people are in their customer journey.** ...Customer Insights enriches that data, brings it together, and provides us with insights."

– Director of technology, maritime brokerage firm

# Reduced time and expense

**75%**

time savings on  
customer journey  
development

**50%**

reduction in  
physical  
marketing spend

**\$75K**

annual savings  
in marketing  
agency fees

**\$120K**

annual savings in  
retired legacy  
solutions



We met our target for  
presales in one day."

– Product manager, sports  
organization

# A closer look at total present value of benefits

**\$269K**

Retired license savings on redundant solutions

**\$1.2M**

Avoided marketing expenses

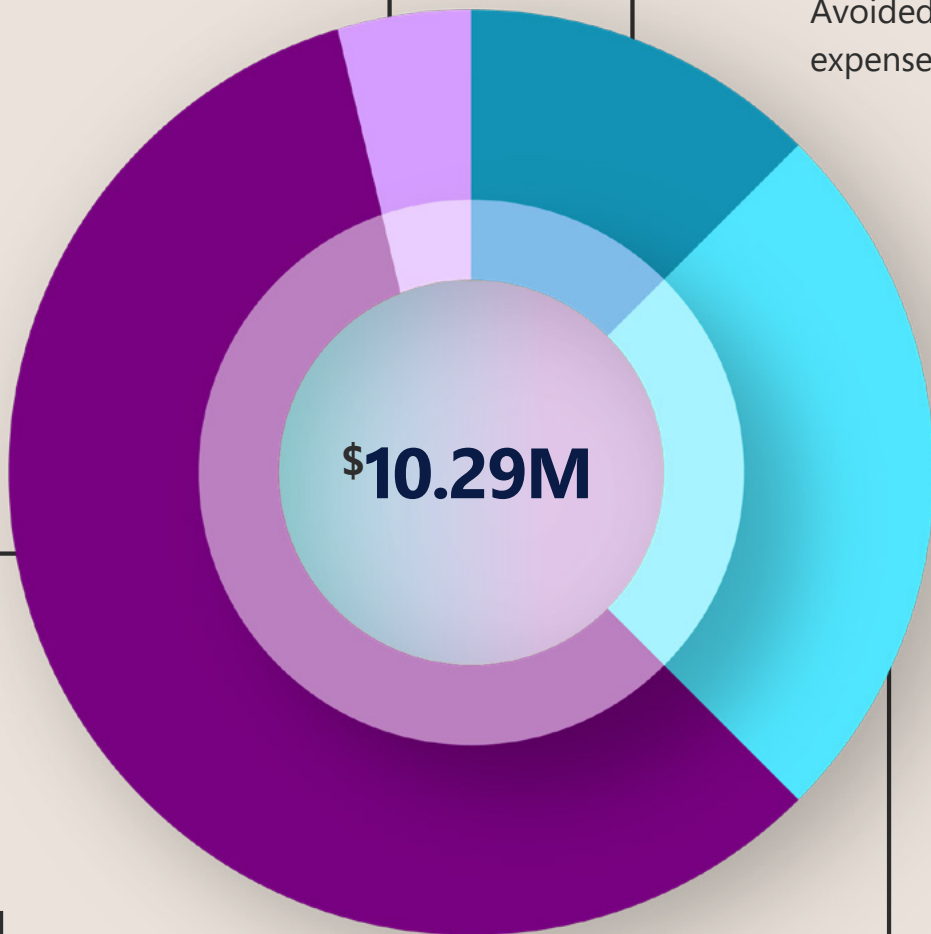
**\$10.29M**

**\$5.3M**

Increased revenue and profit from improved customer visibility and journey development

**\$3.5M**

Marketing and content manager personnel time savings



# Empower employees with a simplified solution

Dynamics 365 Customer Insights improved the employee experience through:

→ Centralization

→ Customization

→ Ease-of-use



Last year, I had to spoon-feed our team for every journey creation. They were scared to use the system, scared of sending things to the wrong audience. This year, I **saw absolutely no fear**. They were more confident with the system, they're more independent."

– *Product manager, sports organization*

# Get to know Copilot in Dynamics 365 Customer Insights

Take advantage of next-generation AI-powered tools to:



Learn more about customers



Create targeted customer segments



Generate personalized content

Copilot in Dynamics 365 Customer Insights allows marketers to:



Engage directly with customer data using natural language



Explore, understand, and predict customer preferences using simple prompts



Free the data and analytics team to focus on more creative tasks



Create targeted customer experiences and interactions

## Copilot prompt example:

“Which of our customers currently live in Washington, DC, are over the age of 25, and have also attended our meet-and-greet event in the last six months.”

# Create simplified, more successful customer journeys with AI

AI reduces complexity and boosts success in these ways:



Improved customization



Automatic hand-off of leads



AI recommendation for next actions



Auto-updated data



It's really easy for both sales and marketing to see stats and analytics about clients, segments, [and] personas...

**Making sure our outreach is precise, exact, and on-point** is a challenge we've been able to overcome with Microsoft Dynamics 365 Customer Insights."

*– Director of technology, maritime brokerage firm*

# Engaging customer experiences can transform business

Assisted by AI and real-time analytics, Microsoft Dynamics 365 Customer Insights offers a unified customer data platform that:

- Transforms how organizations view and interact with their customers
- Empowers businesses to streamline customer journey development
- Drives enhanced customer engagement and personalized experiences
- Helps marketers make data-driven decisions
- Delivers improved operational efficiency and increased revenue

## Read the full study

To understand the potential for your organization, read the full Forrester Total Economic Impact study

## Learn more

Contact sales to see how Microsoft Dynamics 365 Customer Insights can help your organization drive sales and revenue.

\* Results are based on a composite organization of 5,000 employees with \$1 billion in annual revenue. Benefits are based on a three-year risk-adjusted present value.

