

Connected Customer Experiences

How to evolve beyond CRM

 Microsoft
Dynamics 365



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Evolve beyond CRM to create a connected CX

Introduction

Connected CX: The new competitive edge



Connected CX: The new competitive edge

Changes in customer expectations, purchase behavior, and brand interactions mean that customers want and expect personalized experiences that they have more control over. But it's become harder to give customers what they want. Just having a CRM solution is no longer enough; improving customer relationships also requires a strategy for collecting and using customer data in an efficient, connected, and comprehensive way.

Moving beyond CRM toward a connected CX requires a connected workforce. Disconnected workplace technologies have reduced employee productivity. Disconnected sales, service, and marketing departments operate independently and out of sync. It's time to change that. Today, all employees should have the tools and structure they need to collaborate well and understand the entire customer journey—not just their own siloed interactions—to ensure seamless customer experiences at every stage.

Make your organization more efficient, effective, and competitive, without increasing employee effort, with a connected CX strategy that will:

1. Connect sales, service, and marketing
2. Empower employees.
3. Engage customers.

Definition

Connected customer experience (CX):

Providing excellent experiences and value to customers by coordinating people, data, and strategies across sales, service, and marketing functions. A connected CX strategy moves beyond the collection and centralization of customer data in a customer relationship management (CRM) system to engage customers on their own terms.

01

Connect sales, service, and marketing



Connect sales, service, and marketing

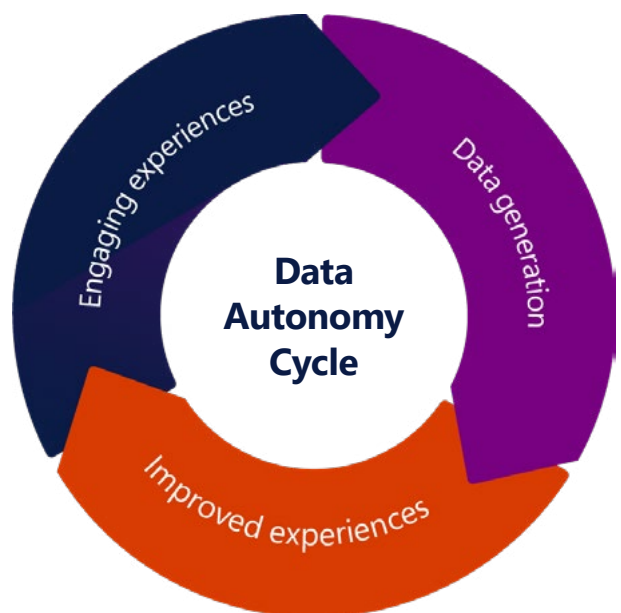
A disconnected approach makes it challenging for sales, service, and marketing departments to understand fluid customer preferences at scale. If this disconnect isn't addressed, you can't provide personalized experiences throughout the customer lifecycle—resulting in a negative impact on your bottom line.

To unify sales, service, and marketing functions, you need to:

- **Achieve data autonomy**
Online customer activity generates a huge amount of data across advertising, search, social media, and e-commerce sources. Generally, outside partners have been used to help corral that data, but changes in customer expectations and government regulations around privacy have made that dynamic less effective. Taking full ownership of customer relationships and all associated data isn't easy, but it's the only way to get into a virtuous cycle of great experiences that

generate usable data, thus enabling deeper insights and personalization to ultimately improve the customer's next experience with your business.

- **Invest in AI and analytics tools**
AI helps teams act on data in a more informed way and at scale by suggesting the next best actions, assessing customer sentiment, and revealing shared insights.



- **Implement an omnichannel CRM that encompasses sales, marketing, and service activities**

All employees can contribute to customer profiles by entering the data that's relevant to their role in the business; sales teams can enter details from sales conversations, for example, while service teams record their post-sale contact. Then all employees can access these 360-degree profiles on any platform and at any stage of the customer journey for a collective and accurate view of your customer base. Having a single source of truth reduces context switching and keeps the flow of data connected and accessible by hybrid teams across departments.

- **Break down cultural and corporate silos**

Connecting employees who used to work independently from each other eliminates

work duplication, optimizes spending, and allows whole teams to work together more efficiently. Define roles between corporate and field teams so you can centralize field marketing tactics like events and demand generation with corporate tactics like flagship events and paid media.

Great ideas originate from all levels and departments. For example, you can encourage marketing teams to seek perspective from sales and service teams so they can gain a firsthand account of consumer behavior and perceptions at different stages of the customer journey. With that insight, marketers are better able to build campaigns that alleviate current customer concerns and remove barriers to purchase.

90%

agree that when initiatives are aligned, the customer experience is improved¹

87%

believe alignment between sales and marketing enable critical business growth¹



¹LinkedIn, Moments of Trust, 2022.

02

How Microsoft connected sales and marketing



How Microsoft connected sales and marketing

The challenge

Microsoft recognized that a disconnected sales and marketing approach had a negative impact on the employee and customer experience. Without a complete view of the customer journey, marketing and sales teams often duplicated efforts and customers had inconsistent brand experiences.

The solution

Microsoft built the Global Demand Center, an always-on, integrated, and scaled B2B marketing-sales pipeline with machine learning and AI to send the right data signals at the right time. Through its Global Demand Center, Microsoft connects sales and marketing departments to gain an end-to-end view of Microsoft customers.

The results

Sellers and marketers now work together on planning, strategy, and accountability measures. This includes aligning on budget, evaluating performance together, and diversifying the team—adding data scientists, operational experts, even engineers—to improve the quality of the data that serves as the foundation for strong customer experience. A new joint investment model projects lifetime value-to-customer-acquisition costs, demonstrating the long-term value of connecting sales and marketing functions.



I actually budget in partnership with my sales leader. So we are doing it together from the very start ... we look at [performance] together, we solution things together and, in some cases, our teams have great ideas and so we fund them together.

Stephanie Ferguson

*Corporate Vice President, Marketing,
Global Demand Center, Microsoft*

03

Empower employees



Empower employees

Employees who spend less time on manual tasks and have the tools they need to collaborate well are happier and more productive. They then spend more time on customer experience work that really matters, like qualifying leads more effectively, building 360-degree views of customers, and using data to make informed decisions with a bigger impact.

To empower employees:

- **Automate tasks to maximize productivity**

Manual data entry is inefficient, error-prone, and could lead to inaccurate data and forecasts, which can become roadblocks to great experiences.

Incorporating automation into workflows can reduce or eliminate manual tasks like taking notes during customer calls or CRM data entry. This allows employees to do more with less, reducing monotony,

increasing productivity, and creating more engaged teams.

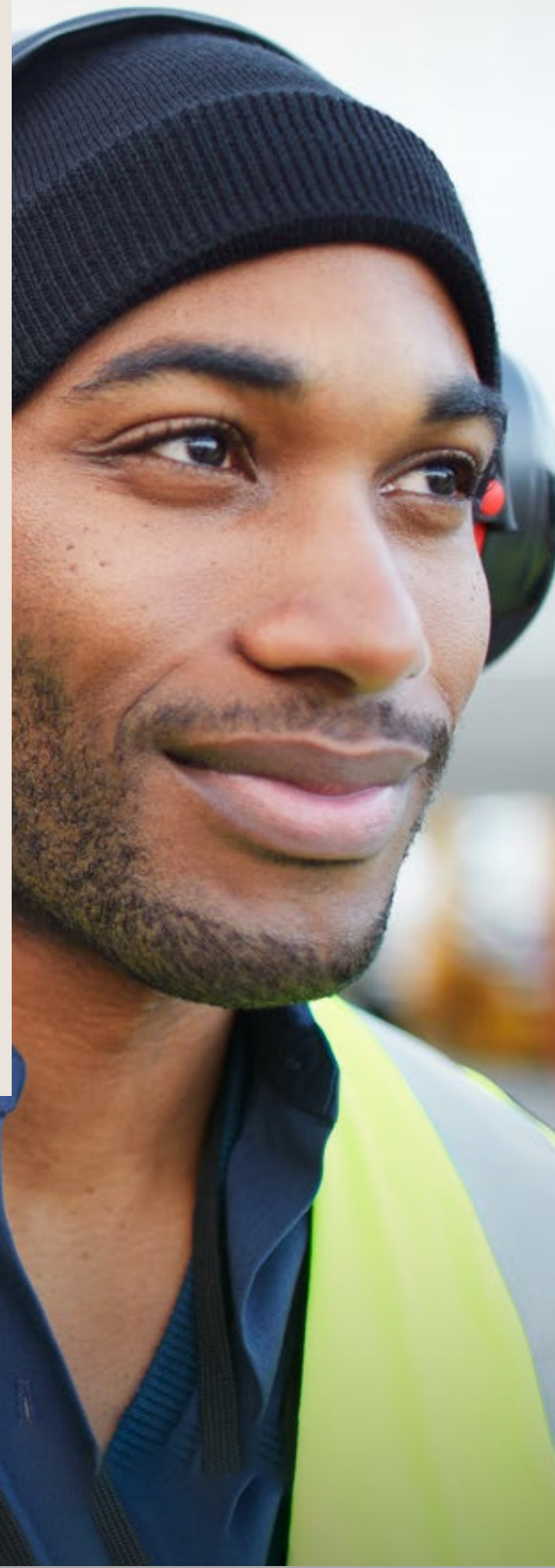
- **Support remote collaboration with the right tools**

For many organizations, the sudden increase in remote work brought on by the pandemic resulted in a buying spree of tools and solutions to make collaboration easier. But many of those tools created more work to manage, monitor, and use. Now is the time to reassess your toolkit and then pare down, consolidate, or replace any that add work to employees' plates.

Collaboration can also be made easier with improved visibility for all. Centralizing sales and marketing solutions opens communication across departments with automatic synchronization among sales, marketing, customer insights, and collaboration tools.

04

How Lufthansa Cargo empowers employees



How Lufthansa Cargo empowers employees

The challenge

As one of the world's leading companies in airfreight transportation, Lufthansa Cargo transports shipments to nearly 300 destinations in more than 100 countries. Record-breaking growth and ambitious innovation goals created the need for a more advanced and centralized way to manage its customer service and sales information. An aging system had left Lufthansa Cargo with siloed information, data duplicates, and limited functionality, making cross-team collaboration challenging. The organization embarked on a CRM migration project with a clear goal in mind: to replace their outdated system with something more streamlined, efficient, and accessible.

The solution

Lufthansa Cargo worked with Microsoft to develop a single system that pulls information and communication channels into one location, creating a centralized touchpoint for all customer information and their related shipments. The custom-developed platform, called oneCRM, is built on Microsoft Dynamics 365 Sales, Dynamics 365 Customer Service, and Dynamics 365 Customer Voice. Its integrated, end-to-end approach helps the organization respond to customers faster and with greater accuracy—delivering on the Lufthansa Cargo mission to provide exceptional personalized service experiences. Investment model projects lifetime value-to-customer-acquisition costs, demonstrating the long-term value of connecting sales and marketing functions.



The major advantage is the level of transparency between the different departments. It ensures we're always talking about the same customer—no matter at which of the multiple touchpoints they engage with us throughout their journey.

Michele D'Angelo

*Senior Manager of Processes and Performance
for Global Customer Service, Lufthansa Cargo*



decrease in
operating
costs across
the entire
CRM solution

The results

oneCRM is designed to organize information in a chronological, intuitive way. Microsoft Exchange is directly integrated into the system, ending the need to search for related emails or piece together customer information across multiple apps and improving productivity for all. Case management teams can address support requests and fix incidents faster and with greater accuracy with Dynamics 365 Customer Service. Both sales and customer service teams can now get detailed, real-time insight into cases and customer data all in one place, even if the customer has interacted with multiple departments across the organization. This has reduced the previous siloed approach of a separate sales and service system, allowing for more powerful cross-team collaboration. Lufthansa Cargo teams now think more creatively across borders, processes, structures, and even organizational targets.

05

Engage customers on their terms




Engage customers on their terms

The path to purchase is no longer linear. Customers now move fluidly between channels and touchpoints. For example, a customer may engage with a brand's social media, then browse product reviews on other sites before making a purchase on the brand's own website. And customers expect a consistently excellent experience in every interaction.

Provide reliable, engaging experiences when you:

- **Deliver one-on-one interactions that exceed expectations**
Use your unified customer data profiles to track and analyze customer preferences, goals, and engagement history alongside external data to deliver data-driven, concierge-level service. Ensuring a seamless experience across all channels builds rapport, increases satisfaction, and nurtures demand long-term.
- **Support customer independence**
Customers have become comfortable browsing, purchasing, and troubleshooting on their own. Why not help them? Use your customer data to your advantage: improve their experience by simplifying steps in the customer journey, removing roadblocks, and developing easy-to-use support tools that empower customers to achieve more on their own.
- **Anticipate future needs**
Through repeated use and feedback, AI tools can forecast customer needs and goals to help your organization evolve from delivering reactive support to offering proactive service. Improve customer experiences by automating customers' regular tasks, offering just-in-time assistance, and solving potential issues along the journey before they become real problems.


Greater personalization in retail leads to:



40%

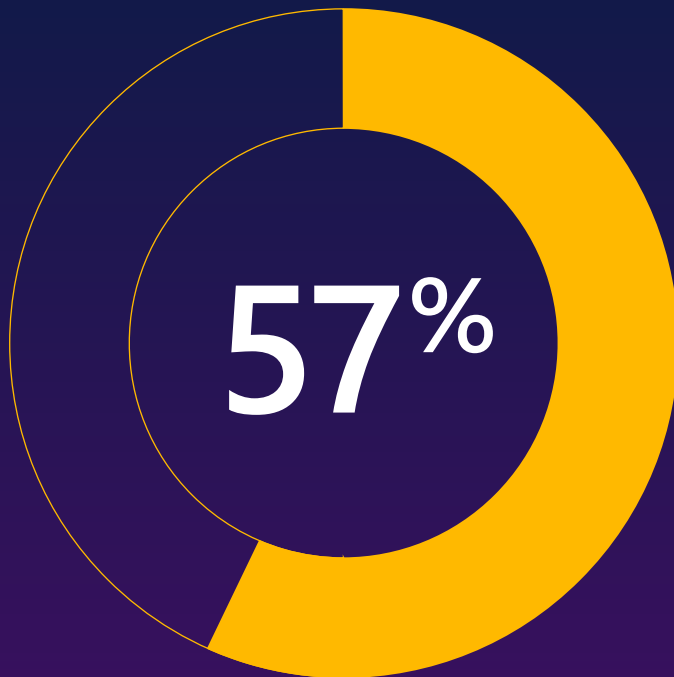
increase in average
value order

+



110%

a increase in number
of items purchased³



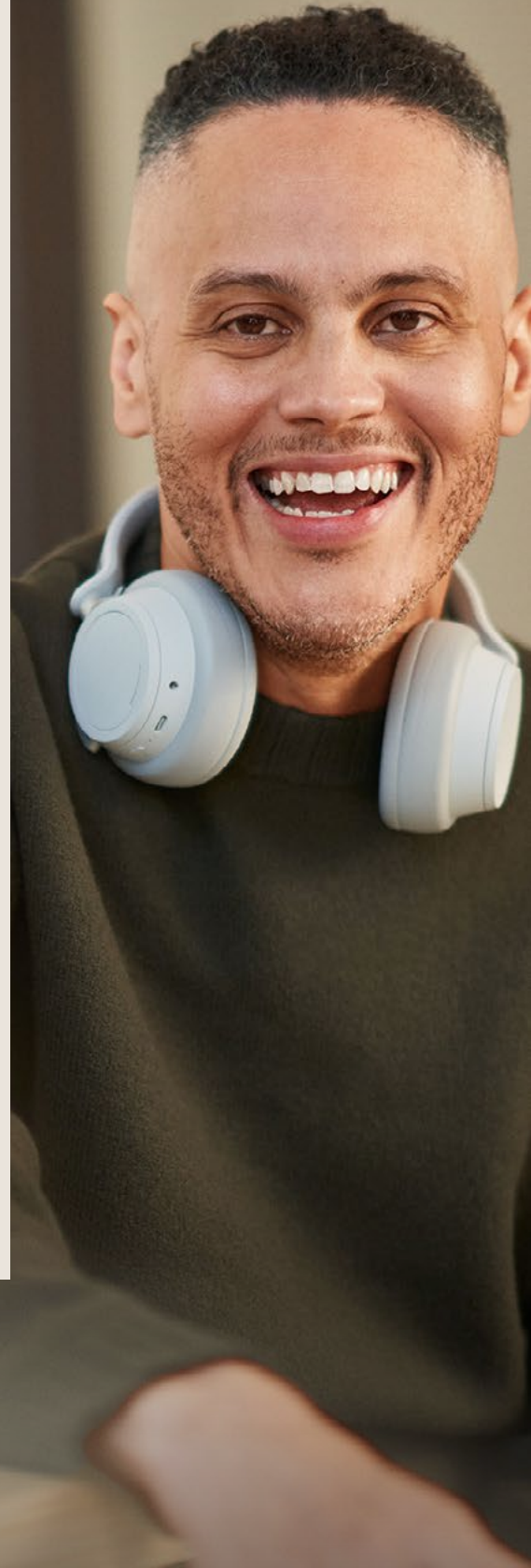
of online retail
customers say they
will typically try
self-serve assistance
options before
reaching out to
customer service⁴

³Boston Consulting Group, Greater Personalization in Retail, 2019.

⁴CFI Group and Radial, Retail Report, 2019.

06

How Valencia Club de Fútbol engages customers



How Valencia Club de Fútbol engages customers

The challenge

In addition to hosting their popular soccer games, Valencia Club de Fútbol (Valencia CF) also oversees ticket sales on and offline, sells merchandise at retail stores and e-commerce sites as well as food and beverages at the stadium, and offers tours and other content experiences—like the social feeds that their 8.1M followers consume. Together, these transactions generated a huge amount of data. But because that data was compartmentalized and disconnected, Valencia CF couldn't use it to get a complete view of their fans.

The solution

Valencia CF brought multiple sources of data together to personalize experiences and predict what each customer needed using Microsoft Dynamics 365.

Along with a data science team, Valencia CF combined data sources and generated insights that made it possible to create more meaningful experiences and hyper-personalized interactions for fans.

Valencia CF has been able to make better decisions both in the moment and before things happen with Dynamics 365. For example, the customer support team can now determine whether a fan prefers to communicate by phone, in-person, or on Twitter—and then engage that fan through the channel of their choice.

“We realized we knew very little about what the ticket-buying or shirt-selling process was like.”

Franco Segarra

Innovation Director, Valencia CF

Connecting
with fans in
context, using
technology,
led to a



increase
in match
attendance.

The results

Valencia CF has created superfans with excellent experiences at every point of contact—starting with the end of long lines. The team realized that the 15-minute half-time during the game is when most people seek out food and drink, and that fans needed a faster and easier way to make those purchases—or risk missing the next big goal. In partnership with a system integrator partner, the team built a food delivery app so fans could remain in their seats.

During the pandemic, game attendance became unpredictable. Valencia CF developed attendance predictions for certain segments of their audience—followed by personalized outreach—with Dynamics 365. Their goal was to show that they cared about their fans. If someone didn't attend the game, Valencia CF would send them an email or call to ask if everything was okay.

Valencia CF is now applying marketing automation to its comprehensive data to create hyper-personalization across the customer journey, recognizing the individuality of each of their fans.

Conclusion

Evolve beyond CRM toward a connected CX

With these three elements of a connected CX strategy, you'll offer better customer and employee experiences that drive revenue:

Connect sales, marketing, and service

Take ownership of customer data, create unified customer profiles, add AI-powered insights to your processes, and encourage collaboration so that sales, marketing, and service teams can provide personalized, meaningful interactions at the right time through the right channels.

Empower employees

Adopt technology that optimizes workflows, boosts productivity, and generates insights and recommendations so employees spend less time on manual tasks that don't help progress company goals.

Engage customers

Make customers feel understood and supported by using data to make each interaction as personalized as possible, allowing customers to self-serve when and where they want, and predicting their future needs for faster, better service.

Take the next step

Discover more connected CX insights and strategies from Microsoft and other industry leaders.



[Learn more](#)