



MICROSOFT DYNAMICS 365 CUSTOMER INSIGHTS FOR MARKETING AUTOMATION , STAKEHOLDER ENGAGEMENT AND CRM

Delivering measurable value in the public sector,
with modern communications and intelligent automation tools

SERVICE OVERVIEW

Brightwire delivers stakeholder engagement, marketing and communications solutions using Microsoft Dynamics 365 Customer Insights, enabling organisations to understand, engage and communicate with customers, citizens, members and stakeholders more effectively. Customer Insights brings together data from across Dynamics 365 and connected systems to create a unified, real-time view of individuals and audiences, supporting insight-led engagement and coordinated communications.

Customer Insights supports the design and orchestration of targeted, automated journeys across channels, enabling organisations to plan, deliver and measure personalised communications at scale. Using segmentation, real-time triggers and behavioural insight, teams can deliver relevant messages at the right time, improving engagement while reducing manual effort.

Configured Customer Insights solutions can support stakeholder and marketing teams through:

- ▶ Audience segmentation based on profile, behaviour and engagement data
- ▶ Automated, multi-step journeys for marketing, stakeholder engagement and communications
- ▶ Orchestration of communications across email and digital touchpoints
- ▶ Personalised email marketing driven by unified customer and stakeholder data
- ▶ Real-time triggers based on interactions, events or changes in status
- ▶ Insight and analytics to understand engagement, performance and outcomes
- ▶ Dashboards and reporting to support operational and strategic decision-making
- ▶ AI-assisted capabilities and Copilot features to support journey design, content drafting and insight generation, with human oversight and governance controls

All engagement, insight and communication data remains within the Microsoft Dynamics 365 platform, supporting consistent governance, security and integration with wider customer service, case management and operational processes. Brightwire configures Customer Insights in line with organisational objectives, using a configuration-first approach and aligning journeys, insight and automation to real business needs.

We're proud to work with forward thinking clients across multiple sectors and industries, delivering applications using Dynamics 365 and the Power Platform, Umbraco and SharePoint, as well as business intelligence, custom solutions, mobile apps and systems integration.



Using the proven Success by Design approach and agile delivery methodology, Brightwire works closely with customers to design and configure Dynamics 365 and Customer Insights solutions that prioritise business outcomes. We take a configuration-first, low-code approach wherever possible, applying proportionate custom development where it adds value.

We also have extensive experience in customising and extending Dynamics 365 and have a wide range of case studies where our solutions have delivered increases in team productivity, efficiency gains and improvements in customer service and stakeholder management.

Our work makes a positive difference to our clients and their people, through smart business applications built on the best technology platforms. Our customer engagement and business transformation programmes deliver tangible results and quantifiable benefits.

At Brightwire, our experienced solution architects, consultants and developers help organisations to design, plan, build, customise, deliver and support Dynamics 365, Customer Insights and Power Platform applications, streamlining operations, delivering productivity gains, and improving engagement.

SERVICE SUMMARY

- ▶ Delivery of cloud-based stakeholder, engagement, marketing and communications solutions built on Microsoft Dynamics 365, Customer Insights and the Microsoft Power Platform, based on extensive Brightwire experience across public sector and regulated environments
- ▶ Proven delivery of citizen, stakeholder, membership, case, complaint and contact centre systems, including self-service portals and digital forms
- ▶ Strong expertise in configuring Dynamics 365 to support real operational processes, with tailored, supported customisation where appropriate
- ▶ Journey orchestration, communications & insight to improve engagement, consistency and efficiency
- ▶ Unified view of customers, citizens, members and stakeholders to support tailored communications
- ▶ Responsible use of AI, automation, business rules and workflows to improve data quality, content creation, consistency, insight and routing of cases and interactions – with human oversight
- ▶ Delivery of clear, usable interfaces that support user adoption and provide meaningful insight
- ▶ Extensive experience of integrating Dynamics 365 with Microsoft 365, SharePoint, websites, portals and line-of-business systems
- ▶ End-to-end service covering discovery, design, build, configuration, integration, training and support
- ▶ Configuration-first approach, with low/no code, using custom development only where it adds value, reducing risk and cost
- ▶ Support for the full solution lifecycle, from early discovery and prototyping through to live operation and continuous improvement



- ▶ Offers rapid discovery and proof of concept as part of Brightwire's agile development methodology
- ▶ Experienced, security cleared Microsoft architects, developers and engineers
- ▶ Brightwire's business transformation, process and analysis experts ensure business priorities are addressed, minimising risk and delivering immediate value
- ▶ Role-based access control using Microsoft Entra ID ensures appropriate access and auditability. Microsoft cloud services are certified to recognised security and privacy standards including ISO/IEC 27001, ISO 27017, ISO 27018, SOC 2 and GDPR.

DYNAMICS 365 CUSTOMER INSIGHTS SUMMARY

Microsoft Dynamics 365 Customer Insights enables organisations to engage customers, citizens, members and stakeholders using a unified, real-time view of data. It supports segmentation, automated journeys and orchestrated communications across email and digital channels, with analytics to measure engagement and outcomes. AI-assisted capabilities and Copilot features support insight generation, journey design and content drafting with appropriate governance and human oversight. Brightwire has extensive experience in designing and delivering Customer Insights solutions for leading public sector organisations, aligning insight and automation to real operational needs from discovery through to live service.

- ▶ Unifies customer, citizen, member and stakeholder data into a single, trusted profile
- ▶ Creates dynamic segments based on profile, behaviour and engagement data
- ▶ Supports targeted stakeholder engagement and marketing communications at scale
- ▶ Orchestrates automated, multi-step journeys across communications channels
- ▶ Enables personalised email marketing driven by real-time insight
- ▶ Triggers communications based on events, interactions or status changes
- ▶ Provides insight and analytics to understand engagement, reach and effectiveness
- ▶ Delivers dashboards and reporting to support operational and strategic decisions
- ▶ Integrates with Dynamics 365 customer service, case management and engagement processes
- ▶ Supports data governance, consent and compliance within the Microsoft platform
- ▶ Uses AI-assisted features and Copilot capabilities to support journey design, insight and content creation
- ▶ Scales to support evolving organisational needs without additional platforms



BRIGHTWIRE'S EXPERTISE AND EXPERIENCE

Brightwire has a solid track record in designing and developing applications based on Dynamics365, aligned with your strategic objectives and achieving business transformation and organisational change.

Applications we've delivered in the public sector range from customer complaints handling to product management to call centre applications, customer service, membership and relationship management.

We provide innovative and configured instances using a combination of out of the box features and low/no code as well as customised solutions. Integration with other systems, automation, business rules and approval workflows help to ensure information is captured accurately, and routed correctly.

This service provides end-to-end professional services for the design, configuration, customisation and support of solutions built on Microsoft Dynamics 365, Customer Insights and the Microsoft Power Platform. It is designed to help public sector organisations deliver modern, secure and user-centred digital services, enabling effective engagement with customers, citizens, members and stakeholders.

The service leverages the core capabilities of Dynamics 365 and the Power Platform to deliver configurable case management, communications and customer journeys, relationship management, workflow automation, reporting and integration with wider Microsoft and third-party services. Solutions are tailored to each organisation's operational and governance requirements, using a configuration-first approach and proportionate custom development where required.

This service supports organisations at all stages of their digital journey, from initial discovery and proof of concept through to live service operation and ongoing improvement. Brightwire's experienced solution architects, consultants and developers support the full lifecycle, from discovery and design through to delivery, training and ongoing support, helping organisations improve engagement, streamline communications and realise value from their Dynamics 365 and Customer Insights investment.

WHAT WE DELIVER

- ▶ Discovery and analysis to understand user needs, operational processes and outcomes
- ▶ Solution architecture and design aligned to Microsoft Dynamics 365 and the Power Platform
- ▶ Functional consulting to translate business requirements into practical platform solutions
- ▶ Configuration, customisation and development using Dynamics 365 and the Power Platform
- ▶ Training to support user adoption, knowledge transfer and long-term capability
- ▶ Integration with apps such as SharePoint, M365, third-party systems and telephony providers
- ▶ Ongoing application support, maintenance and continuous improvement
- ▶ Business intelligence analysis and design, Power BI development and Fabric
- ▶ Custom applications, canvas and model driven apps, and end user web portals
- ▶ AI, automation, workflows and approvals, trigger notifications



KEY FEATURES

- ▶ Robust, usable and secure capabilities to enhance communications and interactions
- ▶ Fully configurable case, contact and relationship management
- ▶ Unified contact management that centralises information across multiple channels
- ▶ Personalisation, using knowledge of previous activities and cases, to tailor interactions
- ▶ Uses AI to optimise intelligence, enhance the end user experience and empower internal users – amplifying your teams' capabilities and reducing handling time
- ▶ Manages activities and cases, complaints and engagements
- ▶ Integrates seamlessly with telephony, events, and other systems to provide a unified experience
- ▶ Portals - stakeholder, membership, case and citizen portals allowing people to manage their enquiries, feedback, complaints, cases and interactions
- ▶ Secure data capture via forms, portals and integrations
- ▶ Engages stakeholders through integrated enterprise feedback management systems
- ▶ Provides familiar tools which are easy to adopt, alongside integration with other MS products such as M365, Outlook and Azure
- ▶ Extensible architecture aligned to Microsoft best practice and security
- ▶ Role-based security and permissions
- ▶ Workflow automation and business rules
- ▶ Reporting and dashboards using Power BI

KEY BENEFITS

- ▶ Rapid delivery using agile approach and proven Microsoft platforms
- ▶ Delivers immediate value and a quick return on investment
- ▶ Reduced implementation risk through configuration-first approaches
- ▶ Improved data quality and visibility
- ▶ Scalable solutions that evolve with organisational needs
- ▶ Alignment with UK public sector digital and security expectations
- ▶ Better stakeholder, citizen and member engagement
- ▶ Improves operational efficiencies by automating routine tasks and accelerating processes
- ▶ Provides actionable, intelligent insights
- ▶ Easily scales to accommodate growth, whilst reducing costs of serving audiences
- ▶ Microsoft Cloud Services certified to recognised ISO standards and aligned to GDPR



EXAMPLES OF OUR WORK

Examples of our Dynamics 365, Customer Insights and PowerPlatform implementations include

- ▶ Customer service including end-customer enquiries, customer behaviour and contact management to a national highways agency, a national debt enquiry service, ombudsman services, a national tourism organisation and a child protection agency
- ▶ Integrated stakeholder portals for self-service for a national debt enquiry service
- ▶ Volunteer applications for a leading non-profit organisation
- ▶ Marketing automation for a wide range of customers, using Dynamics 365 Customer Insights as well as Click
- ▶ Mobile apps addressing specific use cases for field staff across sector
- ▶ Membership management including nurture marketing, membership engagement, member renewals, fundraising and donor management, Gift Aid HMRC submissions for several organisations including a leading beverage association and museums
- ▶ Stakeholder management, interactions and marcomms for a national policing conduct organisation
- ▶ Use of the non-profit accelerator for charitable/membership organisations, with a range of out of the box features specifically designed for managing memberships and all of their touchpoints – whether attending events, buying items from your online shop, or visiting your sites
- ▶ Call centre use of Dynamics 365, integrated with telephony; GDPR compliant for a national highways agency, and a national debt enquiry service
- ▶ Complaints and case handling, integrated with complaints forms presented on public-facing websites including GDS compliant web forms for a central Government prosecution service;
- ▶ Marketing automation including email templates, campaigns, nurture marketing and analysis across a range of sectors;
- ▶ Legal matters and case management for a nationwide lobbying organisation in the food & drink sector;
- ▶ Handling customer facing activities such as Freedom of Information and Subject Access Requests across a range of sectors;
- ▶ Custom integration with various Postcode and Address Finders (See Brightwire's Postcode Pro Service Definition);
- ▶ Custom integration with other line of business applications such as DVLA, Smart Meters, Power BI and mapping software;



ONBOARDING

When we engage with you our focus is on understanding your organisational needs and problem areas, in order to make appropriate and relevant recommendations. Usually this takes place in an initial Discovery meeting. We have a proven approach to client engagement with the Success by Design model, using a structured set of stages, processes and tasks to manage the project successfully, and at each step we provide appropriate documentation to support this.

We set out to quickly understand your current situation in sufficient depth to be able to make useful and pragmatic recommendations. Our client-focussed mindset helps us to engage with you quickly and efficiently, and results in enjoyable and productive relationships in the long-term. We are proud of the relationships we have with our clients and in helping to make a positive difference to their organisations through smarter use of technology. All of our projects are structured with a project team comprising a Project Manager, an Account Manager and a designated Lead Developer. We use an agile methodology to develop projects in defined sprints, with early visibility of progress and early validation with users.

WHAT YOU CAN EXPECT

- ▶ A **structured discovery stage** to confirm scope, objectives, success measures and delivery approach
- ▶ **Establishing the agreed governance model** and communications plan
- ▶ **Engaging with your teams and stakeholders** to ensure business needs and processes are well understood
- ▶ Agreeing the **development approach**
- ▶ **Process mapping** (from as-is to to-be) and wireframing
- ▶ **Technical and business solutions blueprint** including:
 - Program strategy: vision, drivers, governance, timelines
 - Application strategy: architecture, integrations, D365 components
 - Data strategy: governance, architecture, entities, migration approach
 - Integration strategy: interfaces and external systems
 - Test strategy: testing including automation, and responsibilities
 - Business process strategy: process maturity, scope, fit gap analysis
 - Security strategy: roles, access, compliance, governance
 - Application lifecycle management (ALM): DevOps, CI/CD environments
 - Environment and capacity strategy: deployment topology, environments
 - Intelligence strategy: analytics and reporting design
- ▶ **Classification of risks, issues and assertions**
- ▶ **Recommendations**
- ▶ Agreement of commercial terms, and a **clear programme work and deliverables**
- ▶ **Agile development and delivery** with iterative sprints, playbacks and feedback loops
- ▶ **Automated deployments** aligned with secure development practices
- ▶ **Ongoing support**, maintenance, guidance and consulting
- ▶ **Evergreening and platform optimisation**, including proactive advice on new Dynamics 365 and Power Platform features, ongoing compatibility assurance, and support to adopt enhancements as the platform evolves.

OFFBOARDING

Where required, we support orderly offboarding at the end of an engagement. This includes knowledge transfer, documentation handover, and support for data export or transition in line with customer requirements and Microsoft platform capabilities. We develop, agree and maintain an Exit Plan that supports offboarding, and allows for a smooth and orderly transition at the end of the service period.

SUPPORT SERVICES

Application support is provided via a service desk with email, phone and online issue tracking during agreed service hours. Incidents are managed using predefined, ITIL-aligned processes and prioritised in line with agreed service levels. Support services are tailored to the needs of our customers.

TRAINING SERVICES

Our team provide training for each delivered client application. This training covers technical training on the platform and customisation, administrator and end-user training as well as 'train the trainer' training. Where agreed we will provide detailed manuals, documentation, quick user guides and video guides. Training sessions are done in person or remotely with a workshop style and are based on common user scenarios, covering the overall concepts of the application as well as a hands-on element.

We engage with our customers' teams early on, ensuring that the right people take part in sprint playbacks and progress updates and become quickly familiar with the application as it's developed. These sessions help increase confidence and allow a critical feedback loop, ensuring the application will be readily adopted by a wider user base. These sessions also help to equip your teams and application 'champions' with expertise and knowledge of the application, encouraging other users and supporting their training needs too – ensuring continuous improvement and knowledge sharing.



SOCIAL VALUE CONTRIBUTIONS

We support delivery of social value in line with the G-Cloud 15 Social Value Model through our delivery approach and business practices:

- ▶ **Tackling economic inequality:** We create opportunities for skills development through mentoring and training, and support public sector customers to build internal capability and digital skills. Our delivered applications are designed to be user-friendly and easy to adopt, reducing the training period for customer staff and new hires, which accelerates their productivity. In addition our solutions are designed to be accessible and flexible, enabling part time workers to contribute effectively from their preferred environments. Our approach to areas of the project such as co-development and training means that we enable customers' staff to upskill, and transfer knowledge to others.
- ▶ **Fighting climate change:** We deliver cloud-first solutions using Microsoft cloud services, reducing reliance on on-premise infrastructure and minimising travel through remote-first delivery practices. This cloud infrastructure optimises operational efficiency and promotes environmental stewardship through data-driven insights and streamlined processes.

Dynamics 365 and the Power Platform reduces the need for physical IT resources, by centralising data storage and computing in Microsoft's energy-efficient datacentres that prioritise renewable energy and minimise carbon footprints.

Additionally, it automates workflows and optimises resource allocation, reduces the need for physical resources and decreasing the environmental footprint of daily operations.

- ▶ **Increasing supply chain resilience:** We work with a network of and specialist suppliers, supporting a diverse and resilient supply chain aligned to the G-Cloud marketplace ethos.
- ▶ **Building healthier communities:** We promote staff wellbeing through flexible working practices and design user-centred digital services that improve accessibility and outcomes for service users. Our business applications are not only designed to enhance operational efficiency but also to support the wellbeing of our customers' workforce. By fostering a user-friendly environment, our solutions help alleviate stress and promote a positive work atmosphere, contributing significantly to employee satisfaction and mental health. For the Brightwire team on this contract, all staff already have access to a wellbeing programme. This includes access to resources through our provider, as well as other initiatives too.
- ▶ **Driving innovation:** We apply modern Microsoft technologies, including low-code and automation capabilities within Dynamics 365 and the Power Platform, to deliver practical innovation tailored to public sector needs. Where appropriate, we support the responsible use of AI-enabled features to improve insight, efficiency and service responsiveness, such as intelligent routing, data analysis and assisted content generation. All solutions are designed to be transparent, secure and aligned with customer governance, data protection and ethical AI requirements.