



Service Definition Document

TTEC Digital Microsoft Dynamics Customer
Insights Journeys (Marketing)



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1. Introduction

1.1. Company Overview

G-Cloud 15 Legal Entity and Ownership

TTEC Consulting (UK) Limited, a TTEC Digital Company, is the legal entity for G-Cloud 15. TTEC Consulting (UK) Limited is ultimately owned by TTEC Holdings, Inc., a listed company publicly traded on the NASDAQ Stock Exchange.

Parent Company Overview: TTEC Holdings, Inc.

TTEC Holdings, Inc. (NASDAQ:TTEC) is a leading global customer experience (CX) technology and services innovator for AI-enabled digital CX solutions. Serving iconic and disruptive brands, TTEC's outcome-based solutions span the entire enterprise, touch every virtual interaction channel, and improve each step of the customer journey.

TTEC operates through two business segments:

- TTEC Digital: Designs, builds, and operates omnichannel contact centre technology, CRM, AI and analytics solutions.
- TTEC Engage: Delivers AI-enabled customer engagement, customer acquisition and growth, tech support, back office, and fraud prevention services.

TTEC Digital: Customer Experience Technology and Consulting Services

At TTEC Digital, we offer customer experience (CX) consulting, software, and technology services at the intersection of contact centre, CRM, AI and analytics. We call this intersection the point of conversation and we apply our expertise here to drive shareholder value for our clients in the form of revenue growth, cost reduction, and productivity improvement.

In today's digital landscape, customer conversations and the contact centre technologies that support them are inseparable. With decades of innovation across leading contact centre



platforms and deep expertise in CX strategy, data, and AI, TTEC Digital enables organisations to maximise their technology investments and create exceptional customer experiences.

Microsoft Credentials

TTEC Digital is recognised among top Microsoft partners worldwide for our commitment to innovation and delivering outstanding customer solutions. In addition to achieving 2025 Microsoft Dynamics 365 Service Partner of the Year, TTEC Digital has also been named to Microsoft's Inner Circle for AI Business Solutions for ten years in a row. Our deep expertise spans the full Microsoft ecosystem, including their Cloud and AI Platform (Azure, Fabric, Analytics) and AI Business Solutions portfolio (Dynamics 365, Copilot Studio, Power Platform, Teams), enabling us to deliver faster, smarter outcomes.

1.2. Value Proposition

TTEC Digital empowers public sector organisations to deliver personalised, data-driven citizen engagement through Microsoft Dynamics 365 Customer Insights. By unifying customer data across systems and orchestrating real-time, multichannel journeys, TTEC enables marketing and service teams to create impactful experiences that drive loyalty and operational efficiency. Their modular approach supports phased adoption of Customer Insights – Data and Journeys, allowing organisations to evolve at their own pace. With deep expertise in CX strategy, AI, and Microsoft technologies, TTEC combines its Adaptive Iterative Methodology (AIM) with robust governance and managed services to ensure secure, scalable, and compliant delivery. This results in measurable outcomes, enhanced segmentation, and responsive engagement strategies aligned with UK public sector standards and digital transformation goals.



Contact Centre Technology

Your contact centre serves as the main point of interaction between your business and your customers. Effective technology, empowered agents, and clear processes are critical to converting these customer interactions into key business outcomes like customer satisfaction, loyalty, and sales growth.

By integrating Dynamics 365 Customer Insights with contact centre platforms, TTEC Digital enables agents to access unified customer profiles and behavioural data in real time, enhancing personalisation and resolution outcomes.

Artificial Intelligence

Along with our technology partners, TTEC Digital has pioneered AI solutions in the contact centre for more than a decade. That means we are ready to help you solve the tough questions, because we have solved them before. If AI is on your list, our team of CX experts can help you assess your AI roadmap, design an AI strategy, and deploy the right AI toolset to enhance your contact centre's productivity.

Customer Insights leverages built-in AI and machine learning to enrich customer data and predict behaviours, which TTEC Digital uses to design intelligent routing, sentiment analysis, and journey orchestration strategies.

Customer Relationship Management

Your customer interactions take many forms. From sales to service to every touchpoint in between, a cohesive customer experience is the key to earning repeat business and lifetime loyalty. With CRM at the centre, TTEC Digital can help you execute a holistic CX strategy that strengthens your connection with customers and drives business growth.



TTEC Digital combines Dynamics 365 Customer Insights with CRM to unify customer data across channels, enabling more targeted engagement and seamless transitions between marketing, sales, and service.

CX Strategy and Design

Customer experience (CX) is evolving, but a significant gap remains between what brands think they are delivering and what customers actually experience. Despite investing in new CX technologies, many organisations still face declining customer satisfaction.

At TTEC Digital, we recognise that technology alone cannot bridge the experience gap; it demands a comprehensive strategy. Our CX designers and strategists focus on integrating effective design and operational strategies first, ensuring they deliver the results your brand and customers deserve.

Using Customer Insights, TTEC Digital helps organisations co-create journey maps and segmentation strategies that reflect real customer behaviours and preferences, closing the gap between expectation and experience.

Data and Analytics

Harnessing the power of your data is critical to differentiate your customer experience. TTEC Digital's data and analytics solutions gather customer and journey data from across your organisation, transforming it into insights that strengthen your connection with customers and introduce valuable efficiencies to your contact centre operations.

Dynamics 365 Customer Insights provides the foundation for TTEC Digital's analytics solutions, enabling predictive modelling, segmentation, and KPI tracking that inform smarter CX decisions.



Managed Services

The world is moving to a multi-cloud, multi-platform, multi-AI landscape. It is a complicated environment, and your customer experience depends on all aspects working perfectly in harmony.

So, how do you monitor the clouds and make sure apps are running as expected? How do you know which new platform features are best for your business? And how do you deploy these features safely and effectively?

You need to spend your time innovating and differentiating, not babysitting your CX technology. SurroundCX™ Managed Services can help. TTEC Digital's managed services include continuous optimisation of Customer Insights environments, ensuring segmentation models, journey orchestration, and data pipelines evolve with your business needs.

Software and Digital Engineering

Built on the legacy expertise of Avtex, Serendebite, Voicefoundry, Aria, and others, our comprehensive portfolio of IP solutions is designed to help you effortlessly deploy new features and customer experience capabilities into your contact centre environment.

TTEC Digital engineers extend Customer Insights with custom connectors, APIs, and Power Platform components, enabling integration with legacy systems and bespoke engagement workflows.



1.3. What the Service Provides

TTEC Digital's Customer Insights service offering empowers public sector organisations to deliver differentiated and personalised experiences at scale by leveraging Microsoft Dynamics 365 Customer Insights, Azure Data, and AI capabilities.

The following section highlights the key features and benefits of TTEC Digital's Microsoft Dynamics 365 Customer Insights (Marketing) solution. Designed to unify customer data, enable AI-driven segmentation, and deliver actionable insights, these capabilities empower public sector organisations to personalise engagement, optimise campaigns, and ensure compliance with data protection standards. By leveraging advanced analytics, low-code extensibility, and seamless integration with Microsoft's ecosystem, this service provides a secure, scalable foundation for data-driven marketing transformation.

Key Features and Benefits

- **Map, Match, Merge, and Enrich Customer Data from 300+ Sources:** Creates a single, unified customer view by consolidating data from multiple systems, reducing operational overhead and improving data accuracy.
- **Built-in AI and Machine Learning for Unified Customer Profiles:** Delivers predictive insights and behavioural patterns, enabling smarter segmentation and personalised engagement strategies.
- **AI-Based Segmentation for Targeted Campaigns:** Improves campaign ROI by grouping customers based on behavioural and demographic attributes, reducing marketing spend and increasing relevance.
- **Identify Key Behavioural and Demographic Trends Across Customer Groups:** Provides actionable intelligence for strategic decision-making, helping organisations anticipate needs and tailor services effectively.



- Out-of-the-Box Connectors for Popular Data Source: Accelerates implementation and reduces integration complexity by enabling seamless connectivity with widely used platforms.
- Integration with Power Apps for Custom Solutions: Supports low-code/no-code development, allowing organisations to build tailored workflows and applications without heavy IT dependency.
- Configurable Customer Actions and KPIs Across System: Enables cross-channel performance tracking and goal alignment, ensuring marketing efforts are measurable and impactful.
- Customer Insights Integration with Dynamics 365 Marketing and Omnichannel: Delivers a cohesive engagement experience across email, SMS, social, and web channels, improving customer satisfaction and loyalty.
- Compliance with Privacy and Data Protection Standards (GDPR): Ensures secure handling of sensitive data and adherence to regulatory requirements, reducing risk and safeguarding trust.
- AI-Based Prediction Models and Measurement for Meaningful Segments: Enhances decision-making through forecasting and trend analysis, enabling proactive engagement and resource optimisation.

Dynamics 365 Customer Insights is a cloud-native customer data platform (CDP) hosted on Microsoft Azure. It enables organisations to unify customer data from disparate sources, derive actionable insights, and orchestrate personalised journeys across marketing, sales, and service channels. The platform is designed to be secure, scalable, and compliant with GDPR and other data protection standards.



Customer Insights is composed of two integrated modules:

1. Customer Insights – Data

This module focuses on creating a unified customer profile by ingesting, mapping, and enriching data from multiple sources.

Key capabilities include:

- Data unification: Map, match, and merge customer records from various systems (CRM, ERP, web, social, etc.).
- AI-powered enrichment: Use built-in AI and ML to enhance profiles with predictive attributes and segmentation.
- Segmentation: Create dynamic segments based on behavioural, transactional, and demographic data.
- Out-of-the-box connectors: Seamless integration with popular data sources and Microsoft ecosystem tools.
- KPIs and indicators: Configure metrics and visualise them via Power BI dashboards.
- Privacy and compliance: Built-in controls to support GDPR and other regulatory frameworks.

Benefits:

- Reduces overhead in achieving a single customer view.
- Enables low-code/no-code data integration.
- Supports advanced analytics via Azure Synapse.
- Enhances decision-making with AI-driven insights.



2. Customer Insights – Journeys

This module enables organisations to design, automate, and optimise customer journeys across channels.

Key capabilities include:

- Journey orchestration: Build real-time, event-driven journeys tailored to customer behaviour and preferences.
- Personalisation at scale: Deliver contextual messages across email, SMS, push notifications, and more.
- Integration with Dynamics 365 Marketing: Align campaigns with unified customer profiles.
- A/B testing and analytics: Optimise journeys using built-in experimentation and performance tracking.
- Omnichannel feedback: Incorporate sentiment and customer voice data to refine engagement strategies.

Benefits:

- Drives customer engagement through personalised experiences.
- Improves campaign ROI with targeted segmentation.
- Enables responsive, real-time interactions.
- Strengthens customer loyalty and satisfaction.

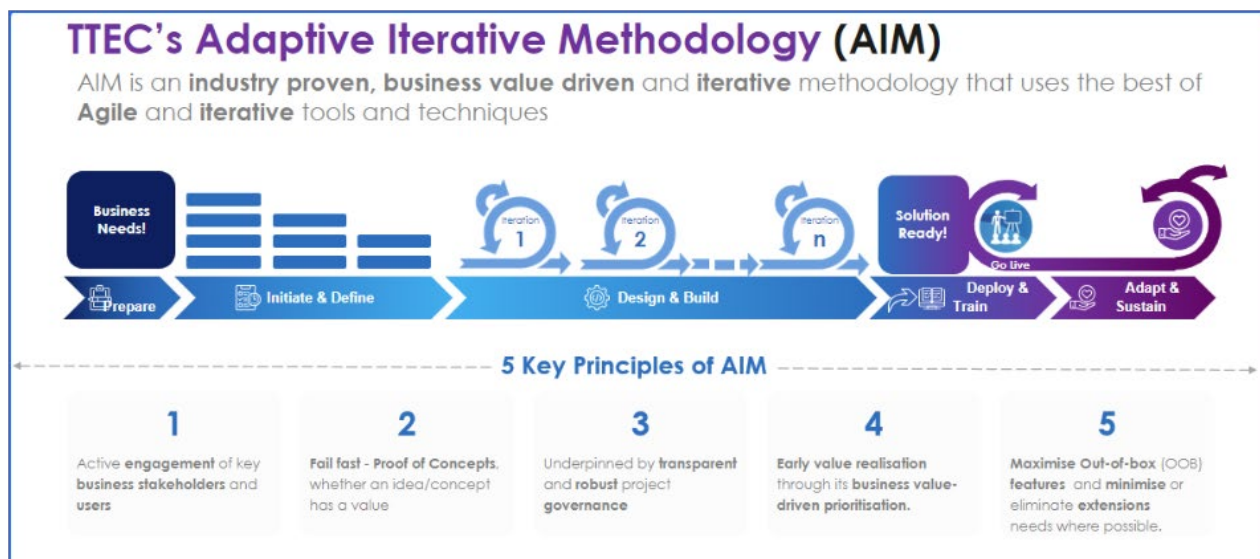
The combination of Customer Insights – Data and Customer Insights – Journeys delivers a transformative capability for organisations seeking to unify customer understanding with real-time engagement. CI Data provides the foundation by consolidating and enriching customer profiles from diverse sources, enabling precise segmentation and predictive insights. CI Journeys builds on this intelligence to orchestrate personalised, multichannel experiences that respond dynamically to customer behaviour.



When delivered by TTEC Digital's seasoned experts, who bring deep domain knowledge in CX strategy, data analytics, and Microsoft technologies, this integrated solution becomes a powerful engine for driving customer loyalty, operational efficiency, and measurable business outcomes. TTEC's proven methodologies and managed services ensure seamless implementation, governance, and continuous optimisation, making the most of every customer interaction. Our service is delivered via a secure, multi-geo Azure deployment with disaster recovery, and does not require buyers to maintain any hardware. All updates and maintenance are managed by Microsoft and communicated in advance.

Delivery Methodology

TTEC has delivered over 500 full lifecycle Dynamics 365 programmes. Combining TTEC's industry-proven AIM (Adaptive Iterative Methodology) framework with our deep Dynamics experience helps our customers achieve their transformation goals. AIM has five distinct phases, namely: Prepare, Initiate and Define, Design and Build, Test, Train and Deploy and Adapt and Sustain. Each phase has quality gates with well-defined entry and exit criteria.





Our AIM methodology is tailored to the unique capabilities of Dynamics 365 Customer Insights:

- **Prepare:** We assess existing data landscapes and customer engagement strategies to define the scope for CI Data unification and CI Journeys orchestration.
- **Initiate and Define:** Stakeholder alignment and business case validation are conducted, with a focus on segmentation goals, journey triggers, and KPIs.
- **Design and Build:** Unified customer profiles are configured using CI Data, while CI Journeys are designed to deliver personalised, multichannel experiences.
- **Test, Train and Deploy:** Data pipelines, segmentation logic, and journey flows are validated. Training is delivered to marketing, service, and analytics teams.
- **Adapt and Sustain:** Ongoing optimisation of segments and journeys using real-time feedback, A/B testing, and performance analytics.

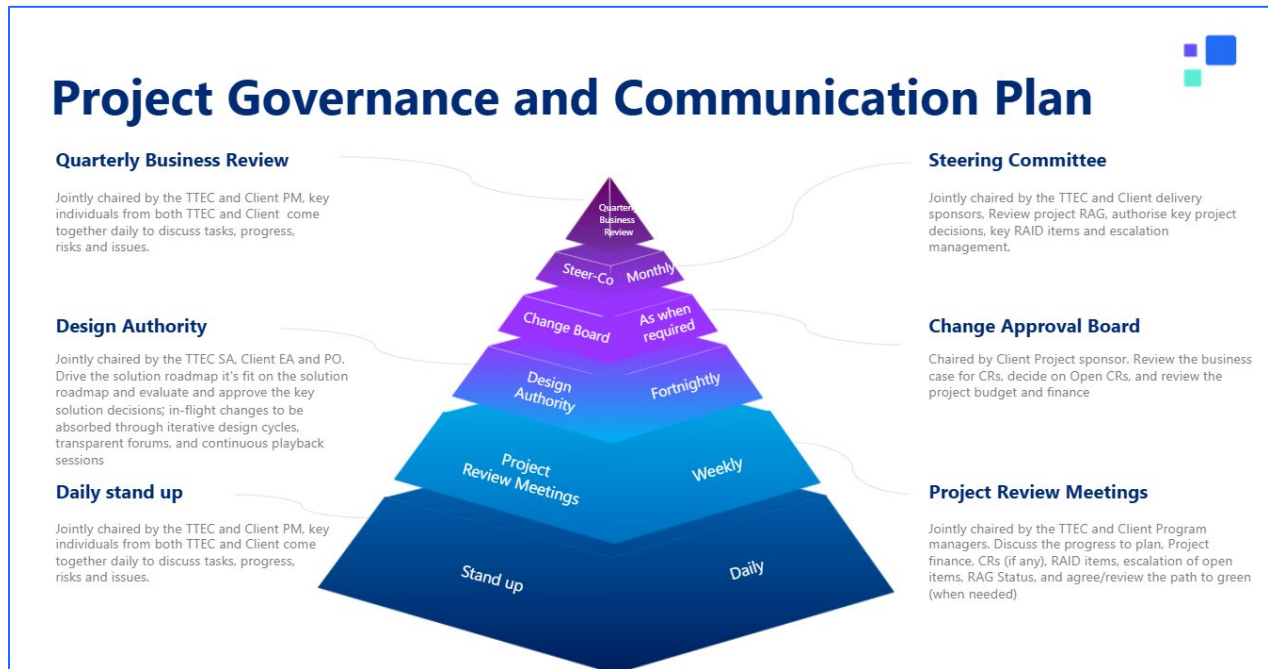
AIM focuses on three key tenants:

1. **Customer Experience:**
 - We co-create CX strategies that leverage unified profiles and journey orchestration to deliver relevant, timely, and emotionally resonant experiences.
2. **Robust and scalable architecture:**
 - CI Data and Journeys are deployed on Microsoft Azure with multi-geo support, ensuring scalability, disaster recovery, and compliance.
 - Integration with Power Platform and Dynamics 365 ecosystem ensures extensibility.
3. **Adoption and Ownership:**
 - Our approach drives high adoption among marketing and service teams
 - Intuitive UI, low-code configuration
 - Proactive feature requests from end users.



Our Governance

AIM is supported by TTEC's governance model, thus ensuring effective and timely governance is applied throughout the SDLC.



AIM is supported by TTEC's governance model, ensuring effective and timely oversight throughout the Customer Insights implementation lifecycle. This governance framework is designed to align with the unique requirements of both CI Data and CI Journeys, ensuring that data integrity, privacy, and customer experience objectives are consistently met.

For CI Data, governance focuses on ensuring that data ingestion, unification, and enrichment processes comply with GDPR and other regulatory standards. TTEC applies rigorous controls to manage data mapping, matching, and merging across disparate systems, with built-in privacy safeguards and auditability. Quality gates are embedded at each phase of the AIM framework to validate data accuracy, segmentation logic, and AI-driven enrichment outcomes.



For CI Journeys, governance ensures that journey orchestration is aligned with strategic CX goals and that personalisation is delivered responsibly across channels. TTEC's governance model includes stakeholder engagement checkpoints to validate journey triggers, content relevance, and performance metrics. A/B testing and feedback loops are governed to ensure continuous improvement and ethical use of customer data.

TTEC's governance also encompasses:

- **Privacy and Compliance Alignment:** All CI implementations are hosted on secure, multi-geo Azure environments with disaster recovery, and buyers are not required to maintain hardware. Microsoft manages updates and maintenance, with proactive communication to clients.
- **Stakeholder Engagement:** Governance includes structured collaboration with marketing, service, and analytics teams to ensure adoption and alignment with business objectives.
- **Continuous Improvement:** Post-deployment, TTEC monitors performance analytics, user feedback, and evolving business needs to refine segments and journeys. This ensures the solution remains responsive and impactful over time.

By embedding governance into every phase of the AIM methodology, TTEC Digital ensures that Customer Insights implementations are not only technically sound but also strategically aligned, secure, and adaptable to future needs.



1.4. Overview of the G-Cloud Service

The CCS G-Cloud 15 framework provides public sector organisations with a streamlined, compliant, and flexible route to procure cloud-based services, including hosting, software, and support. As an open framework established under the Procurement Act 2023, G-Cloud 15 spans five refined lots covering cloud hosting (IaaS/PaaS), software (SaaS), and cloud support services. It replaces previous frameworks such as Cloud Compute and introduces direct award capability across all lots, enabling faster access to solutions without mandatory competition.

TTEC Digital's offering under G-Cloud 15 focuses on Microsoft Dynamics 365 Customer Insights, a cloud-native customer data platform composed of two powerful modules: Customer Insights – Data and Customer Insights – Journeys. These modules work together to unify customer data and orchestrate personalised, multichannel experiences. However, we recognise that organisations may not be ready to adopt both modules simultaneously. Our approach allows for modular implementation, enabling clients to begin with either CI Data or CI Journeys, and incorporate the other module at a later stage as their digital maturity evolves.

This flexibility ensures that public sector organisations can align their procurement with strategic priorities, whether that's improving data quality and segmentation, or enhancing citizen engagement through personalised journeys. Our phased delivery model supports this evolution, with expert guidance from TTEC Digital throughout the lifecycle.

G-Cloud 15 is designed to support the UK government's Cloud First policy and digital transformation goals. It simplifies procurement while ensuring suppliers meet high standards for quality, security, and public value. The framework places increased emphasis on Social Value, requiring suppliers to demonstrate contributions to community, environmental, and economic outcomes. It also enforces sustainability commitments through Carbon Reduction Plans and aligns with Net Zero targets. Suppliers must adhere to cybersecurity standards such as Cyber



Essentials Plus and maintain responsible business practices including prompt payment and ethical delivery.

TTEC Digital EMEA combines humanity and technology to serve the public with a digital-first approach. Our Customer Insights services are available on the Digital Marketplace, supporting public sector organisations in modernising citizen services. With deep expertise in CX strategy, data analytics, and Microsoft technologies, we deliver secure, compliant, and impactful solutions that enhance citizen engagement, operational efficiency, and long-term digital resilience.

1.5. Associated Services

Support Services: Adapt and Sustain

TTEC Digital's Adapt and Sustain services are designed to ensure long-term success and continuous optimisation of Microsoft Dynamics 365 Customer Insights implementations, whether focused on CI Data, CI Journeys, or both. Recognising that organisations may begin with one module and expand later, our support model is modular, scalable, and tailored to each client's maturity and strategic priorities.

Our unified Delivery Operations framework provides steady-state support across the Microsoft Business Applications ecosystem, with specialised capabilities for Customer Insights. This includes proactive monitoring, enhancement, and governance of data pipelines, segmentation logic, journey orchestration, and integration touchpoints.

For Customer Insights Data, our support services focus on maintaining data quality, managing connectors, refining segmentation models, and ensuring compliance with evolving privacy regulations. We help clients adapt to changes in data sources, business rules, and Microsoft platform updates, ensuring the unified customer profile remains accurate and actionable.

For Customer Insights – Journeys, our team supports the continuous evolution of journey designs, triggers, and content strategies. We provide A/B testing oversight, performance



analytics, and feedback loop management to ensure journeys remain relevant, responsive, and aligned with citizen engagement goals.



TTEC Digital's Centre of Excellence (CoE) sites serve as the backbone of our Lifetime Services offering. These global hubs bring together CX strategists, data scientists, and Microsoft-certified engineers to deliver expert support, innovation, and governance. Whether clients are scaling across departments or regions, our CoE ensures consistent quality, rapid issue resolution, and strategic alignment.

Our Adapt and Sustain services are built to accommodate continuous change; whether driven by internal transformation, external market shifts, or Microsoft product evolution. With TTEC Digital as a partner, public sector organisations can confidently evolve their Customer Insights capabilities while maintaining compliance, performance, and citizen impact.



2. Data Protection

2.1. Information Assurance/Security

Information security is one of the important pillars of TTEC Holdings, Inc. (NASDAQ: TTEC) and TTEC affiliates core global business model, and maintaining it is crucial for our company, our stakeholders, and our clients. By performing internal audits and independent IT compliance audits, the results provide information that can be used to improve operations, enhance accountability, and identify areas for improvement.

The adherence and certification to multiple compliance frameworks ensures that TTEC maintains industry standards to secure data and network systems for our business and our clients. To maintain compliance across these frameworks, TTEC contracts an independent, third party, accredited, qualified auditing firm to conduct the following assessments. Depending on the platform, TTEC technology environment and business facility space, TTEC aligns and is certified under these compliance frameworks:

Engage:

- PCI DSS (Service Level 1) - maintained and assessed annually.
- SOC 1 Type II (SSAE 18) - maintained and assessed annually.
- SOC 2 Type II (SSAE 18 / 4 of the 5 Trust Principles) - maintained and assessed annually.
- ISO 27001: 2022 - maintained and assessed annually. Full assessment year 1, surveillance audits year 2 and 3.
- HIPAA S.C.R.A. - maintained and assessed annually.

Digital:

- PCI DSS (Service Level 1) - maintained and assessed annually.
- SOC 2 Type II (SSAE 18 / 4 of the 5 Trust Principles) - maintained and assessed annually.



- ISO 27001: 2022 - maintained and assessed annually. Full assessment year 1, surveillance audits year 2 and 3.
- HIPAA S.C.R.A. - maintained and assessed annually.

TTEC Consulting (UK) Limited and TTEC (UK) Solutions Limited Environments (EU Cloud Services Only):

- Cyber Essentials Certificate of Assurance (Basic) - maintained and assessed annually for EU cloud services only.
- Cyber Essentials Certificate of Assurance (Plus) - maintained and assessed annually for EU cloud services only.

Cyber Essentials and Cyber Essentials Plus are certifications developed and recognised by the UK government to help organisations protect themselves against common cyber threats and demonstrate their commitment to cybersecurity best practices.

TTEC's achievement of the Cyber Essentials and Cyber Essentials Plus certifications validates TTEC's security controls and safeguards implemented and maintained adhere to these cybersecurity best practices, how we secure TTEC and our clients against common cyber threats and how TTEC demonstrates, annually, our commitment to improving our cybersecurity posture to align to these best practices.

The following provides an overview of each Cyber Essentials Certification assessment which includes but not limited to:

- Cyber Essentials Certification:
 - Focuses on five key areas of cybersecurity: boundary firewalls and internet gateways, secure configuration, user access control, malware protection, and patch management.
 - Designed for organisations of all sizes and sectors.



- Requires organisations to complete a self-assessment questionnaire and provide evidence of their cybersecurity measures.
 - Certification is valid for one year and can be renewed annually.
 - Provides a basic level of assurance to customers, suppliers, and stakeholders that an organisation has implemented essential cybersecurity controls.
- Cyber Essentials Plus Certification:
 - Includes all the requirements of Cyber Essentials certification.
 - Involves an independent assessment and verification of an organisation's systems to ensure they meet the necessary security standards.
 - Requires organisations to undergo vulnerability scanning and penetration testing.
 - Provides a higher level of assurance compared to Cyber Essentials certification.
 - Certification is valid for one year and can be renewed annually.

2.2. Back-Up and Restore

TTEC Digital's Customer Insights service is delivered as a consulting-led implementation of Microsoft Dynamics 365 Customer Insights; a SaaS solution hosted on Microsoft Azure. As such, traditional backup and restore responsibilities do not apply to TTEC Digital's service offering.

TTEC Digital ensures that all configurations, data mappings, journey designs, and segmentation logic are implemented in alignment with best practices and are fully supported by Microsoft's underlying platform capabilities. In the event of platform-level incidents, Microsoft's recovery mechanisms restore service availability and data integrity. TTEC Digital provides advisory and governance support to ensure clients are informed of platform updates, maintenance schedules, and recovery procedures.



2.3. Data Processing and Storage Location

All customer data, segmentation logic, journey orchestration assets, and analytics are stored within the Azure environment, with Microsoft managing infrastructure-level backups, updates, and maintenance. TTEC Digital complements this with advisory services that ensure clients are informed of platform updates, data residency options, and recovery procedures. In terms of licensing and consumption, Customer Insights is packaged based on usage tiers and feature sets, which can vary depending on the volume of profiles, segmentation complexity, and journey orchestration needs. TTEC Digital provides strategic guidance to help clients select the most appropriate licensing model, optimise asset storage (such as journey templates, connectors, and enrichment models), and monitor consumption to avoid overages. Our experts also assist in forecasting usage patterns, aligning licensing with business growth, and ensuring that organisations maximise ROI from their Customer Insights investment

2.4. Data Restoration / Service Migration

TTEC Digital's approach to data restoration and service migration for Microsoft Dynamics 365 Customer Insights is designed to ensure continuity, resilience, and strategic flexibility across both CI Data and CI Journeys modules.

Data Restoration

As Customer Insights is a SaaS solution hosted on Microsoft Azure, platform-level data protection, including automated backups, geo-redundancy, and disaster recovery, is managed by Microsoft. TTEC Digital complements this with advisory and governance support to ensure clients are informed of platform updates, maintenance schedules, and recovery procedures.

For CI Data, restoration focuses on the integrity of unified customer profiles, segmentation logic, and enrichment models. TTEC ensures that all configurations, mappings, and connectors are documented and version-controlled, enabling rapid recovery in the event of data loss or corruption. For CI Journeys, restoration includes journey templates, triggers, content assets, and



performance analytics, ensuring that orchestrated experiences can be reinstated without disruption.

Service Migration

TTEC Digital supports seamless migration of Customer Insights services, whether transitioning from legacy systems, onboarding new departments, or scaling across regions. Our migration services include:

- **Discovery and Planning:** Assessment of existing data sources, journey frameworks, and business objectives to define migration scope.
- **Data Mapping and Transformation:** Alignment of legacy data structures with CI Data schema, ensuring consistency and compliance.
- **Journey Rebuild and Optimisation:** Re-creation or enhancement of existing journeys within CI Journeys, leveraging real-time triggers and personalisation capabilities.
- **Testing and Validation:** End-to-end testing of data flows, segmentation logic, and journey orchestration to ensure accuracy and performance.
- **Stakeholder Enablement:** Training and documentation to support adoption and ownership post-migration.

TTEC's modular delivery model allows organisations to begin with either CI Data or CI Journeys and incorporate the other module at a later stage. This phased approach ensures that migration efforts are aligned with digital maturity and organisational readiness.

2.5. Business Continuity Statement / Plan

TTEC and TTEC's affiliates are committed to business continuity planning, a prudent business practice to protect employees, clients, stakeholders, and TTEC from various risks and events that may impact the ability to conduct business. TTEC's programme aligns with ISO 22301, NIST 800-34 & 84, CSF (Cyber Security Framework) and Disaster Recovery Institute International – The Professional Practices for Business Continuity Management.



TTEC, being a global company, must remain diligent and be prepared when unexpected incidents occur (fire, earthquakes, typhoons, hurricanes, human events, etc.). TTEC's Crisis and Resiliency Management programme, which includes Business Continuity (BC) and IT Disaster Recovery (DR), emphasises the ability to continue providing business services in the face of adverse operational impacts. TTEC's Global Crisis Management Programme is led by the Vice President of Business Continuity (BC) and IT Disaster Recovery (DR).

TTEC's approach to global crisis and business continuity and IT disaster recovery is to adhere to guiding principles of: Putting People First; Establish Trust; Protection of Clients; and Providing Leadership, with managing unexpected and expected incidents and events. With a strong focus on these principles, TTEC will have the ability to anticipate, prevent, recover from, and learn from crises that may impact employees, facilities, brand/reputation, or operations. Along with TTEC achieving the protection of TTEC's people, TTEC's clients and client's brand, profits and TTEC's brand.

TTEC's Global Crisis and Business Continuity (BC) and IT Disaster Recovery (DR) Management programme has developed a product-driven customer focused recovery model that is both practical and scalable. As part of TTEC Digital's commitment to business continuity, our approach to Microsoft Dynamics 365 Customer Insights, both CI Data and CI Journeys, includes platform-specific resilience planning. Since Customer Insights is hosted on Microsoft Azure, it benefits from Microsoft's geo-redundant infrastructure, automated backups, and disaster recovery protocols. TTEC Digital complements this with governance and advisory services that ensure continuity of segmentation logic, journey orchestration, and unified customer profiles. In the event of service disruption, our teams can rapidly restore configurations, mappings, and journey assets using version-controlled documentation and platform-native recovery tools. Additionally, we collaborate with clients to develop tailored continuity plans that reflect their specific use of CI Data and Journeys, including fallback strategies for critical customer engagement processes and data-driven decision workflows. This ensures that even during adverse events, public sector organisations can maintain citizen engagement, data integrity, and operational performance.



TTEC establishes, implements, and maintains world class crisis response capabilities through solidifying policies and procedures for response to an emergency or other occurrence that can compromise the privacy, confidentiality, integrity, or availability of Client Personal Information and/or damage TTEC's information systems. Such policies and procedures include, but are not limited to: creating and maintaining retrievable copies of Client Personal Data; restoring any loss of Client Personal Information; enabling continuation of critical business processes involving Client Personal Information in emergency mode; assessing relative criticality of specific applications and Client Personal Information to support other contingency plan components; periodic and annual testing and updates of contingency plans and implement lessons learned from testing.

The programme integrates and builds upon existing capabilities within our Security Event Handling Plan, Information Security Operations, Business Continuity, IT Disaster Recovery and Virtual Response teams. Additional partners in resiliency include Information Technology, Operations, Real Estate and Facilities, Legal, People and Culture, and other shared services. The unifying approach and framework are contained in TTEC's Global Crisis Management Policy for managing and responding to crises across TTEC's global enterprise (including but not limited to WFH environment).

TTEC provides redundancy in our technology through hardware and software configuration. Redundancy provides clients with the services that in the event of hardware failure, or software failure, services remain active and available.

Redundant premise equipment mitigates the risk of equipment failure; dual firewalls with stateful inspection, dual routers, and dual core switches in the data centre provide a highly available architecture for client links. TTEC firewall infrastructure provides stateful inspection and the configuration is in active/active or active/standby mode depending on the project specifications/requirement.



The different types of DRP technology and redundancy capabilities used include but not limited to:

- Geo-redundant centralised data centres.
- Dual MPLS WAN via multiple carriers.
- Carrier grade disaster recovery.
- Voice via PSTN TFN/DID, TDM, VoIP, or SIP (SBC).
- Regular testing to ensure readiness and After-Action Plans for lessons learned.
- Functional Management tool that enables systemic, collaborative, and controlled resiliency programme management.

In addition, at least annually, TTEC's Executives (Sr. Advisor BCDR/Resiliency, CSO, CIO, IT, and other supporting departments) review the Global Crisis Programme and the Business Continuity and IT Disaster Recovery plans, processes, and policies, update (as needed) to align to TTEC's business, security and compliance models and adherence with industry compliance framework requirements. TTEC's BCDR and applications are exercised annually and are governed by our Crisis Management and Disaster Recovery policies and guidelines. TTEC's Global Crisis and Resiliency Management Programme, including TTEC's Security Event Handling Programme is assessed and maintained annually, and is certified against TTEC's ongoing industry compliance audit assessments of PCI DSS, SOC 2 Type II, ISO 27001:2022, HITRUST and more.

Lastly, regarding TTEC's Business Continuity (BC) and IT Disaster Recovery (DR) plan approach, TTEC bridges a partnership with our clients with the development of a specific client focused business continuity (BC) and disaster recovery (DR) plans. TTEC collaborates with clients to build a tailored, resilient, and mutually agreeable BC and IT DR plan that encompass applicable TTEC Technology and Services, prevailing industry compliance standards, information security controls, safeguards, and measures, along with operational best practices, and client-specific SLA requirements. Through TTEC and client partnership and strong collaboration will result with eliminating risks and returning to "business as usual" status, and more.



2.6. Privacy by Design

TTEC Digital accommodates applicable data privacy regimes through bespoke data processing agreements (DPA) with its customers that set forth relevant rights and obligations in the context of the data controller-data processor relationship. TTEC Digital also applies appropriate agreed technical and organisational measures and data privacy safeguards (including intercompany standard contractual clauses) to satisfy the legal requirements and the DPA undertakings.



3. Using The Service

3.1. Ordering and Invoicing Process

Buyers wishing to find out more about this service and how to order should contact Wayne Kay, VP EMEA, at gcloud@ttecdigital.com

3.2. Availability of Trial Service

There is no availability of a trial service

3.3. On-Boarding

TTEC Digital's onboarding process for Microsoft Dynamics 365 Customer Insights is designed to support modular and phased adoption of both CI Data and CI Journeys, depending on the client's readiness and strategic priorities. The process begins with a collaborative scoping exercise, where we work closely with the customer to define a precise scope of work aligned to their data maturity, engagement goals, and licensing model. This scope forms the foundation of the engagement and is governed by our Adaptive Iterative Methodology (AIM), which structures delivery across five phases: Prepare, Initiate and Define, Design and Build, Test, Train and Deploy, and Adapt and Sustain. During onboarding, we conduct stakeholder alignment workshops, access planning, and readiness assessments tailored to either CI Data (e.g., data source mapping, segmentation strategy) or CI Journeys (e.g., journey orchestration, trigger logic). We also provide tailored implementation plans, training accelerators, and change management support to drive adoption and ensure the solution delivers measurable business value. Whether starting with CI Data or CI Journeys, our onboarding ensures a smooth and scalable path to full platform utilisation.



3.4. API

TTEC Digital delivers scalable and secure API and integration services to support Microsoft Dynamics 365 Customer Insights implementations, with distinct capabilities for both CI Data and CI Journeys.

For CI Data, our API services enable seamless ingestion, transformation, and enrichment of customer data from diverse systems. We leverage Microsoft Dataverse, Power Platform connectors, and RESTful APIs to integrate with CRM, ERP, web analytics, social platforms, and other enterprise data sources. Using Azure Integration Services (including Logic Apps, Service Bus, and API Management) we design architectures that support real-time data exchange, batch processing, and event-driven automation. These integrations ensure that unified customer profiles are continuously updated and enriched with behavioural, transactional, and demographic data.

For CI Journeys, our API services enable orchestration of personalised, multichannel experiences by connecting CI Journeys with external messaging platforms, campaign management tools, and feedback systems. We support integration with Dynamics 365 Marketing and third-party engagement platforms via event-based triggers, custom connectors, and secure API endpoints, allowing organisations to activate journeys based on real-time customer interactions and contextual data. TTEC Digital captures API requirements during the AIM delivery lifecycle, with governance checkpoints to validate data flow, security, and performance. Where required, we build bespoke APIs to meet unique business needs, including connectors for legacy systems or specialised data sources. All integrations are designed to be monitorable, auditable, and compliant with GDPR and public sector data protection standards. Our architecture supports modular expansion, allowing clients to onboard additional data sources or engagement channels as their Customer Insights usage evolves. This ensures that CI Data and CI Journeys operate as part of a broader digital ecosystem, enabling public sector organisations to unify customer understanding and deliver responsive, personalised experiences at scale.



3.5. International SMS

TTEC Digital incorporates international SMS capabilities as part of its Customer Insights – Journeys implementation strategy, enabling public sector organisations to extend citizen engagement across global messaging channels. SMS is integrated into CI Journeys orchestration workflows to support real-time, event-driven communication, allowing organisations to deliver personalised messages based on segmentation logic and behavioural triggers defined in CI Data. These capabilities are built using Azure Communication Services and can be configured to support both domestic and international routing, ensuring compliance with regional telecom standards and data protection regulations. TTEC Digital provides advisory and implementation support for integrating SMS into journey templates, including message design, opt-in management, and performance tracking. Where required, we develop custom connectors or collaborate with third-party providers to enable seamless interoperability with external messaging platforms. Our delivery teams validate routing configurations, conduct controlled testing, and align SMS workflows with broader omnichannel strategies to ensure continuity of service and measurable impact. This approach ensures that international SMS is not only technically robust but also strategically aligned with the goals of Customer Insights deployments, enhancing citizen engagement and supporting scalable, compliant communication across borders.

3.6. Off-Boarding

TTEC Digital's offboarding process for Microsoft Dynamics 365 Customer Insights is designed to ensure a smooth, structured, and secure disengagement at the conclusion of the engagement. Whether the implementation focused on CI Data, CI Journeys, or both, our offboarding approach is aligned with the agreed scope of work and commercial terms. We work collaboratively with the customer to define a clear exit plan that includes the transfer of all relevant deliverables, including unified customer profile configurations, segmentation logic, journey templates, orchestration triggers, and performance analytics. Documentation and knowledge transfer are



central to this process, covering implementation artefacts, training materials, and change management guidance to support continuity. Where applicable, TTEC Digital supports the transition of Customer Insights services to internal teams or alternative providers, ensuring minimal disruption to citizen engagement workflows and data-driven operations. All offboarding activities are planned to meet contractual obligations and maintain the highest standards of data protection, privacy, and confidentiality. This ensures that public sector organisations retain full control and visibility over their Customer Insights assets and can continue to evolve their CX strategies independently or with future partners.

3.7. Training

TTEC Digital's training services for Microsoft Dynamics 365 Customer Insights are designed to accelerate adoption and maximise the value of both CI Data and CI Journeys. Our training accelerator supports rollout implementation with expert project management and is embedded within our Adaptive Iterative Methodology (AIM) framework. For CI Data, training focuses on enabling marketing, analytics, and service teams to configure and manage unified customer profiles, segmentation models, and enrichment logic. For CI Journeys, we guide users through journey orchestration, trigger setup, multichannel messaging, and performance analytics. A key component of our approach is the ability to measure and track the impact of training on key performance indicators, ensuring that learning translates into business value. We develop and execute tailored training plans that include content creation and delivery for Train-the-Trainer training. To support adoption of new Microsoft features such as Copilot, we incorporate targeted enablement sessions that help users understand and apply AI-powered capabilities within their Customer Insights workflows. These sessions are designed to demystify Copilot functionality, promote confidence in its use, and accelerate productivity gains. Training is delivered alongside a structured change management plan, which includes stakeholder communication strategies and adoption tracking to drive end-user engagement and ensure a smooth transition to enhanced Customer Insights capabilities.



3.8. Implementation Plan

TTEC Digital provides a structured and comprehensive implementation plan tailored to Microsoft Dynamics 365 Customer Insights, encompassing both CI Data and CI Journeys modules. Upon completion of the scope of works, a detailed delivery plan is shared with the buyer, aligned with our Adaptive Iterative Methodology (AIM). This methodology governs each phase of delivery, Prepare, Initiate and Define, Design and Build, Test, Train and Deploy, and Adapt and Sustain, with quality gates and clearly defined entry and exit criteria to ensure consistency and accountability.

For CI Data, the implementation plan includes activities such as data source mapping, ingestion strategy, segmentation logic design, and enrichment model configuration. For CI Journeys, the plan covers journey orchestration design, trigger logic setup, multichannel integration, and performance tracking. Each phase is supported by stakeholder engagement workshops, readiness assessments, and governance checkpoints to validate progress and ensure alignment with business objectives.

The implementation plan also includes detailed timelines, resource allocation, milestone tracking, and risk mitigation strategies. Change management and training components are embedded throughout to support user adoption and ensure a smooth transition. TTEC Digital's approach ensures transparency, strategic alignment, and measurable outcomes, enabling public sector organisations to realise value quickly and confidently from their Customer Insights transformation.



3.9. Service Management

Service Management is aligned with the specific scope of work that will be provided to the buyer on completion of the scoping phase. For Microsoft Dynamics 365 Customer Insights, TTEC Digital provides service management that supports both CI Data and CI Journeys implementations through structured governance, proactive oversight, and continuous optimisation. Our service management approach is embedded within the Adaptive Iterative Methodology (AIM) framework and ensures that all phases, from Prepare to Adapt and Sustain, are monitored and supported with clear accountability.

For CI Data, service management includes oversight of data ingestion, unification, enrichment, and segmentation processes, ensuring data integrity and compliance with privacy regulations. For CI Journeys, it encompasses orchestration monitoring, trigger validation, and performance analytics to ensure journeys are responsive and aligned with citizen engagement goals. TTEC Digital's service management also includes stakeholder engagement, change control, and issue resolution processes, supported by our Centre of Excellence (CoE) and managed services teams. These teams provide ongoing support, platform updates guidance, and strategic recommendations to ensure the Customer Insights solution continues to deliver measurable value.

Service reviews, performance tracking, and roadmap planning are conducted regularly with client stakeholders to ensure alignment with business objectives and evolving needs. This ensures that public sector organisations benefit from a stable, scalable, and continuously improving Customer Insights environment.



3.10. Service Constraints

There are no fixed service constraints for the implementation of Microsoft Dynamics 365 Customer Insights – Journeys beyond the need for active collaboration and access to relevant stakeholders and data sources.

As CI Journeys is a highly configurable and modular solution, successful delivery depends on timely access to customer engagement strategies, communication channels, and integration endpoints. TTEC Digital will work with the buyer during the scoping phase to define all necessary inputs, including journey orchestration requirements, trigger logic, and segmentation dependencies from CI Data.

These needs will be documented in the agreed Scope of Works and validated through stakeholder alignment workshops. Any constraints related to third-party messaging platforms, data availability, or compliance requirements will be identified early and managed through our Adaptive Iterative Methodology (AIM), ensuring a smooth and scalable implementation.

3.11. Service Levels

TTEC Digital does not provide Service Levels for consulting arrangements. Service Levels are available for technical implementations.

However, delivery expectations, milestones, and quality gates are defined within the agreed scope of work and managed through our Adaptive Iterative Methodology (AIM), ensuring transparency, accountability, and alignment with client objectives.



3.12. Outage and Maintenance Management

Outage and Maintenance Management for Microsoft Dynamics 365 Customer Insights – Journeys is handled at the platform level by Microsoft, as the solution is delivered as a SaaS offering hosted on Azure. All infrastructure-level updates, patches, and scheduled maintenance activities are managed by Microsoft and communicated in advance to ensure transparency and preparedness. TTEC Digital complements this with advisory services to ensure clients are informed of upcoming changes that may impact journey orchestration, trigger execution, or multichannel delivery. While direct control over platform uptime resides with Microsoft, TTEC Digital monitors service health and performance through governance checkpoints and provides guidance on mitigating any potential disruption to active journeys. This ensures continuity of citizen engagement workflows and alignment with service expectations throughout the lifecycle of the Customer Insights – Journeys deployment.

3.13. Financial Recompense Model for not Meeting Service Levels

TTEC Digital does not provide Service Levels for consulting arrangements. Service Levels are available for technical implementations



4. Provision of the Service

4.1. Customer Responsibilities

To ensure the successful delivery of Microsoft Dynamics 365 Customer Insights – Data and Journeys, TTEC Digital requires active collaboration and timely input from the customer throughout the engagement.

The following responsibilities are essential:

- **Stakeholder Access and Engagement:** The customer must provide access to relevant stakeholders across marketing, analytics, IT, and service teams to support scoping, design, and validation activities. This includes participation in workshops, governance checkpoints, and training sessions.
- **Data Availability and Quality:** For CI Data implementations, the customer is responsible for supplying access to source systems and ensuring the availability of clean, structured data for ingestion, mapping, and enrichment. This includes CRM, ERP, web analytics, and other relevant platforms.
- **Channel Configuration and Messaging Assets:** For CI Journeys, the customer must provide access to communication channels (e.g., email, SMS, push notifications) and supply messaging content, templates, and branding guidelines required for journey orchestration.
- **Integration Support:** The customer must facilitate access to internal systems and third-party platforms required for API integration, including authentication credentials, endpoint documentation, and technical contacts.
- **Licensing and Consumption Oversight:** The customer is responsible for managing licensing entitlements and monitoring usage against allocated tiers. TTEC Digital will provide guidance, but the customer must approve licensing models and consumption forecasts.



- **Change Management Participation:** The customer must support change management activities, including stakeholder communications, end-user engagement, and feedback collection to ensure adoption and continuous improvement.
- **Security and Compliance Alignment:** The customer must collaborate with TTEC Digital to ensure that all data handling, privacy, and compliance requirements are clearly defined and adhered to, including any organisation-specific policies or regulatory obligations.
- **Timely Decision-Making:** To maintain project momentum, the customer must provide timely decisions on scope changes, design approvals, and issue resolution.

These responsibilities will be documented and agreed upon during the scoping phase and reflected in the final Scope of Works. TTEC Digital will provide structured guidance and project management to support the customer in fulfilling these responsibilities effectively.

4.2. Technical Requirements and Client-Side Requirements

As per the above "Customer Responsibilities".

4.3. Browsers

Microsoft Dynamics 365 Customer Insights – Data and Journeys is delivered as a cloud-native SaaS solution hosted on Microsoft Azure and accessed via modern web browsers. TTEC Digital recommends using the latest versions of Microsoft Edge, Google Chrome, or Mozilla Firefox for optimal performance, security, and compatibility. The platform supports responsive design and accessibility standards, ensuring seamless use across desktop and mobile browsers. No local installation is required, and all updates are managed by Microsoft, with TTEC Digital providing advisory support to ensure clients remain informed of any browser-related changes that may impact user experience or journey orchestration.



4.4. Outcomes/Deliverables

TTEC Digital's delivery of Microsoft Dynamics 365 Customer Insights – Data and Journeys is governed by the Adaptive Iterative Methodology (AIM) and tailored to each client's strategic priorities.

The following deliverables are typical across engagements:

- **Customer Experience Strategy:** A documented vision and prioritised journey maps, identifying key friction points and engagement opportunities.
 - **Solution Prototypes and Unified Profiles:** Configured CI Data models and prototypes integrating CRM, ERP, and analytics sources, enriched with AI-driven segmentation and attributes.
 - **Implementation Plan:** A detailed roadmap with milestones, resource allocation, and quality gates, aligned to the agreed Scope of Works.
 - **Performance Measurement:** Reports and dashboards tracking the impact of segmentation and journey orchestration on key performance indicators.
 - **Change Management and Training:** Structured plans including stakeholder engagement, adoption strategies, and tailored training content for CI Data and CI Journeys.
 - **Fulfilment of Requirements:** Delivery of all agreed functional and technical requirements, validated through governance checkpoints and stakeholder reviews.
- These deliverables ensure public sector organisations can unify customer understanding, orchestrate personalised experiences, and realise measurable outcomes from their Customer Insights investment.



4.5. Development Life Cycle of the Solution

TTEC Digital applies its Adaptive Iterative Methodology (AIM) to all Microsoft Dynamics 365 Customer Insights – Data and Journeys engagements. This proven framework is specifically tailored to the unique capabilities of CI Data and CI Journeys, ensuring that each phase of delivery (from data unification to journey orchestration) is governed by quality gates, stakeholder alignment, and clearly defined entry and exit criteria. AIM comprises five phases: Prepare, Initiate and Define, Design and Build, Test, Train and Deploy, and Adapt and Sustain. Each phase supports right-first-time delivery, promotes transparency, and enables measurable outcomes. TTEC's governance model ensures that Customer Insights implementations evolve in line with business objectives, user needs, and Microsoft's roadmap, while maintaining compliance, scalability, and continuous optimisation throughout the engagement.

4.6. After Sales Account Management

Once you become a TTEC Digital Customer, you will be assigned a Client Success Manager (CSM), who will be responsible for the relationship with your organisation. Your CSM will act as your trusted advisor and will get to know you and your business and help you to identify key strategic objectives to meet your organisational goals. Your CSM will also run regular business/service reviews with you to make sure that we are helping you to deliver effective solutions and will also help you to roadmap your journey to digital transformation. Your CSM is your first point of escalation in times of need. Whilst our teams will align directly with your teams (Project & Programme Management, Service, Support, Procurement, Finance, etc), your CSM will take overall responsibility for the relationship and communication with your organisation. TTEC Digital's Account Strategy is to make sure that we meet and exceed your expectations. We see the role as a key function to ensure smooth service delivery and to educate, benchmark and challenge the status quo, helping you to drive efficiencies and outstanding Customer Experience wherever possible.



We see effective Account Management as a way to build a long term and valuable partnership with your organisation.

4.7. Termination Process

TTEC Digital is open to entertaining reasonable termination mechanisms as part of the contract negotiation that will account for the specificities of the individual business opportunity and the associated commercial terms.



5. Other Messaging Services

TTEC Digital enables multichannel messaging capabilities within Microsoft Dynamics 365 Customer Insights – Journeys to support personalised, event-driven citizen engagement. Beyond native email and SMS, our implementations extend to platforms such as WhatsApp, Facebook Messenger, Apple Business Chat, Google Business Messages, and other third-party messaging services.

We integrate these channels using secure APIs, custom connectors, and Azure Communication Services, ensuring seamless orchestration of messages triggered by behavioural events, segmentation logic, or real-time interactions captured in CI Data. Our architecture supports both synchronous and asynchronous messaging, enabling automated responses, escalation workflows, and contextual communications across touchpoints.

TTEC Digital partners with leading messaging providers (including Twilio, Infobip, Sinch, and Microsoft Azure Communication Services) to deliver scalable, compliant, and resilient messaging solutions. We configure authentication tokens, webhook endpoints, and routing logic to ensure secure message delivery and interoperability with existing systems.

As part of our Adaptive Iterative Methodology (AIM), we design and validate messaging workflows aligned with journey orchestration goals.

This includes:

- **Trigger Logic:** Defining event-based triggers that activate messages based on customer behaviour, segmentation, or lifecycle stage.
- **Consent and Compliance:** Managing opt-in workflows and ensuring adherence to GDPR and telecom regulations.
- **Message Design and Templates:** Supporting branded content creation for SMS, push, and chat channels.



- Performance Analytics: Tracking delivery, engagement, and conversion metrics to optimise messaging strategies.

These capabilities ensure that Customer Insights Journeys implementations are not only technically robust but also strategically aligned with public sector engagement goals, enabling responsive, personalised communication across diverse messaging ecosystems.



6. Environmental Action and Social Value

6.1. Environmental Action

Global Environmental Governance and Strategy

TTEC manages its environmental impact through a structured governance and operational framework. Oversight is provided by a dedicated Board committee and an Environmental, Social, Governance (ESG) Executive Council. We operate under a formal [Climate Change and Environmental Responsibility Policy](#) and align our disclosures with recognised frameworks, including SASB and TCFD. Our environmental strategy includes initiatives focused on energy efficiency, waste reduction, and emissions tracking, with progress informed by regular materiality assessments.

UK-Specific Environmental Action and Net Zero Commitment

TTEC Consulting (UK) Limited is committed to environmental sustainability and achieving net zero emissions by 2045, ahead of the UK Government's 2050 target. Our UK Executive Team has formally endorsed and published a comprehensive [Carbon Reduction Plan](#) that fully complies with PPN 06/21 and its associated guidance. The plan includes transparent disclosures of Scope 1 and Scope 2 emissions, as well as relevant Scope 3 categories, and is reviewed annually to ensure continued alignment with evolving regulatory standards and net zero objectives. This proactive approach reflects our leadership in climate responsibility and our dedication to supporting public sector clients in meeting their sustainability goals.



6.2. Social Value

Creating Positive Impact for Customers and Communities

At TTEC Digital, we are committed to creating lasting social value that benefits both our clients and the communities they serve. Our efforts focus on tackling economic inequality, advancing equal opportunities, and expanding digital inclusion throughout the UK.

To support this mission, every UK-based TTEC Digital employee is encouraged to participate in corporate social responsibility (CSR) initiatives, with one paid day annually reserved for volunteering and community engagement.

Empowering Youth Through Digital Skills

At TTEC Digital, we believe in leveraging our expertise and partnerships to create opportunities for the next generation. One example is the Digital Dev Academy, a collaborative programme that equips students from underserved communities with essential digital and technology skills. The programme is delivered in partnership with TTEC Digital and its network of clients, with support from local authorities and education stakeholders. Its goal is to create inclusive pathways into technology careers by providing hands-on learning experiences and exposure to real-world digital environments.

We work closely with clients to co-design the curriculum, ensuring it reflects current industry needs and emerging technologies. These partners also contribute mentorship, resources, and opportunities for students to engage with professionals across sectors. Their involvement helps bridge the gap between education and employment, making the learning experience both practical and aspirational.

In parallel, we collaborate with county councils to identify eligible schools and students, coordinate logistics, and ensure the program is accessible to those who need it most. This partnership is vital for community engagement and helps embed the academy within local



development strategies. It culminates in a showcase event where students present their work and explore career opportunities with participating partners. The Digital Dev Academy is a powerful example of how cross-sector collaboration can drive social impact and digital inclusion.

Promoting Fair Employment and Economic Resilience

TTEC Digital is a Living Wage accredited employer in the UK, reinforcing our commitment to fair pay, community resilience, and inclusive growth. This milestone reflects our broader mission to empower future talent, support public sector innovation, and create lasting social impact.

At TTEC Digital, we believe that fair pay fosters a positive and collaborative work environment. By ensuring our employees feel genuinely valued, we strengthen relationships across teams and empower individuals to thrive. This leads to better outcomes for our clients, including:

- More engaged teams focused on solving customer challenges.
- Technical experts who go the extra mile to deliver innovative solutions.
- Project managers who build stronger, more trusting relationships.
- Consultants who invest their full expertise in transforming businesses.



7. Our Experience

7.1. Case Study 1

CLIENT TRANSFORMS GLOBAL MARKETING OPERATIONS WITH TTEC DIGITAL

The Challenge

The client, a global manufacturing leader in consumer health and hygiene, manages marketing for iconic brands like Lysol, Enfamil and Mucinex across more than 60 countries. The client sought to migrate its email marketing operations to Microsoft Dynamics 365 Customer Insights. The project quickly evolved into a full-scale modernisation of its marketing ecosystem, across all countries and a diverse portfolio of brands. Amid disconnected workflows, escalating operational costs, and growing demands for data oversight, the client partnered with TTEC Digital to deliver a scalable, AI-driven platform that unifies and elevates its marketing capabilities.

The Solution

Seeking to go beyond platform migration, the client wanted to also elevate their marketing effectiveness, develop comprehensive buyer profiles, and create seamless journey tracking capabilities. TTEC Digital helped the client achieve their goals by implementing Dynamics 365 Customer Insights across the client's global marketing team to streamline marketing efforts. Key efforts included email marketing automation, data integration and standardisation, and end-to-end process optimisation. The team created a unified customer profile by integrating existing data and other supporting systems. The new system also improved marketing campaign management with hyper-personalisation using AI.

The Result

The migration of millions of customer records to Dynamics 365 CI transformed the client's marketing operations globally. The new Microsoft platform significantly improved campaign efficiency, data compliance capabilities, and cost structure, while providing scalability for future



growth. The client was able to consolidate marketing campaigns across multiple global brands , improving efficiency and campaign execution speed. They also improved marketing journey tracking through accurate KPIs and real-time insights.



7.2. Case Study 2

TTEC DIGITAL HELPS NATIONAL RESTAURANT CHAIN SERVE UP MARKETING INSIGHTS WITH MICROSOFT DYNAMICS 365

The Challenge

A large US restaurant chain, with nearly 450 locations, had an issue: they needed better visibility into their marketing efforts. This large family restaurant chain had a variety of disparate marketing tools, including separate email, SMS, CRM, and PoS systems, making it difficult to know how its customers at more than 400 locations were interacting with the brand and what offers to create for them. They turned to the customer experience experts at TTEC Digital. “Our north star is to be able to get the right message at the right time to the right customer with the right persuasive message,” said Steve Smith, Principal Solutions Architect at TTEC Digital. “Understanding your customer has to be inclusive of all the interactions they’ve had with you, and that you’ve had with them.”

The Solution

TTEC Digital deployed Microsoft Dynamics 365 Customer Insights, a unified solution that delivers intelligent customer segmentation alongside the tools clients need to execute their campaigns through real-time marketing channels – enabling a single unified marketing platform with 360-degree customer visibility. Now this restaurant chain can segment audiences by age, location, and dining preferences , like whether they dine alone or with their family, whether they buy breakfast, lunch, or dinner, what day of the week they visit, and whether they use delivery or dine-in.

The Results

With Dynamics 365, TTEC Digital can help eliminate marketing data and journey silos to deliver better customer engagement at an individual customer level. These datapoints are used to produce personalised offers, also known as “audience of one” marketing, which can then be sent



directly with integrated email and SMS/text capabilities as part of defined customer journeys. This means that the customer receives the best offer in the best channel in the moments that matter, increasing overall satisfaction with the brand.

TTEC Digital built a solution that helped the client:

- Achieve customer-centric hyper-personalisation and consistent brand engagement experiences across all touchpoints.
- Unify management of digital marketing channels within a single platform by consolidating disjointed email marketing and text messaging platforms, in this case HubSpot and Upland.
- Create a single customer profile using deterministic and probabilistic artificial intelligence and rules.
- Extract customer and transaction information from existing point-of-sale/ERP systems.
- Predict customer lifetime value and customer churn using artificial intelligence models.
- Build audience segments based on demographic and purchase behaviour.
- Enhance segmentation and personalisation capabilities by leveraging additional demographic information from a third party data broker.

Future Plans

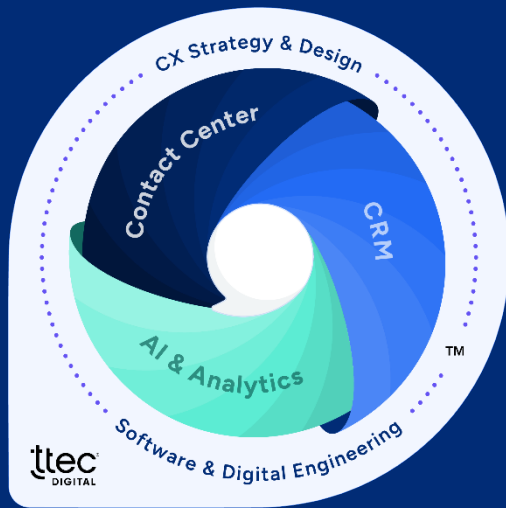
With these new customer journey capabilities now in place, this restaurant chain is already looking at the next phase of the project: using data to further optimise customer journeys and start to identify the ROI of marketing initiatives.

Microsoft Dynamics 365 and TTEC Digital

By pairing the power of Microsoft Dynamics 365 with customer experience transformation expertise of TTEC Digital, clients can experience benefits like:



- Increased customer loyalty. Communications become highly personalised and specific as clients gain fully unified customer profiles, a better understanding of customer preferences. and interoperability with existing tools and granular customer views.
- Increased productivity. Automated intelligent workflows and transaction-triggered messages remove bottlenecks and reduce manual, time-consuming steps, freeing up teams for more impactful work.
- Increased revenue. Real-time pricing and better promotions performance, as well as transactional insights and streamlined processes, can all lead to an increase in revenue.
- Clients can also help show the value of marketing more clearly. With Dynamics 365 Customer Insights in place, their marketing organisation can gain direct visibility into the ROI of any given marketing activity.



About TTEC Digital

TTEC Digital is a global leader in customer experience orchestration, combining technology and empathy at the point of conversation. Today customer conversations, and the contact centre technologies that support them, are inseparable. We bring decades of innovation experience across the world's leading contact centre technology platforms – and blend it with in-house expertise in CX strategy, data and analytics, AI and more – to help organisations maximise their technology investments and create truly exceptional customer experiences.

Contact Us

Wayne Kay

Vice President, EMEA

Email: gcloud@ttecdigital.com

Website: www.ttecdigital.com

