



DYNAMICS 365 CUSTOMER INSIGHTS

G-CLOUD 15

SERVICE OVERVIEW

Telefónica Tech provides a Dynamics 365 Customer Insights service to support organisations in transforming how they understand and engage with citizens and customers.

The service unifies fragmented citizen and customer data and applies Microsoft's generative and predictive AI models to enable earlier understanding of needs, more personalised engagement at scale, and automation of complex journeys with greater accuracy. Using AI-driven segmentation, real-time behavioural insight and Copilot-enabled content generation, organisations can design better services more quickly, reduce operational overhead and proactively intervene before issues escalate.

Delivered on a secure, accredited Microsoft cloud platform available through G-Cloud, Dynamics 365 Customer Insights supports responsible, transparent and compliant use of AI, enabling teams to make faster, evidence-based decisions that improve outcomes for citizens and customers.

KEY FEATURES

- AI-driven unified citizen or customer profiles combining transactional, behavioural, demographic and observational data
- AI-enhanced identity resolution and data quality to unify fragmented data, resolve duplicates and improve accuracy
- Real-time personalisation and journey orchestration using AI-driven triggers, predictions and adaptive content
- Copilot-powered segment, journey and content creation using natural-language prompts
- Predictive analytics and behaviour modelling to identify churn risk, lifetime value and next best actions
- Fully integrated Dynamics 365 Customer Insights platform
- Data maturity assessment and requirements gathering
- Initial connection and mapping of data sources using built-in connectors
- Custom connector integration where required
- Integration with Power Automate, Power Apps and Power BI using Customer 360 profiles
- Configuration, testing and release management services
- Included training for Customer Insights users
- Ongoing application support

KEY BENEFITS

- **Improved Citizen and Customer Experience**
AI-powered personalisation delivers timely, relevant interactions that improve satisfaction and service outcomes.
- **Faster Time to Value**
Automation, Copilot-assisted workflows and real-time AI recommendations reduce manual effort and accelerate delivery.

- **Single View of Citizens and Customers**
Unified profiles provide a trusted, 360-degree view of engagement and behaviour across channels.
- **Improved Service Quality and Responsiveness**
Real-time insight enables proactive intervention and more consistent service delivery.
- **Reduced Risk and Improved Compliance**
AI-driven data governance, identity resolution and monitoring support GDPR alignment and audit requirements.
- **Scalable and Future-Ready AI Platform**
Customer Insights integrates with Copilot, Power Platform and Azure to support ongoing AI maturity.
- **Flexible and Secure Access**
Role-based security ensures appropriate access while maintaining control and governance.
- **Lower Barrier to Entry**
Market-leading capability delivered with rapid deployment and controlled cost.
- **Knowledge Transfer and Enablement**
Training and ongoing engagement support long-term value and capability growth.

ADDITIONAL SERVICES

- Customer and citizen data strategy and maturity assessments
- Advanced journey design and orchestration
- Integration with CRM, case management and line-of-business systems
- Custom AI model configuration and optimisation
- Governance and responsible AI framework design
- Adoption and change management support
- Reporting and insight optimisation using Power BI
- Extension using Power Platform and Azure AI services
- Ongoing optimisation, support and managed service options

Thank you

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