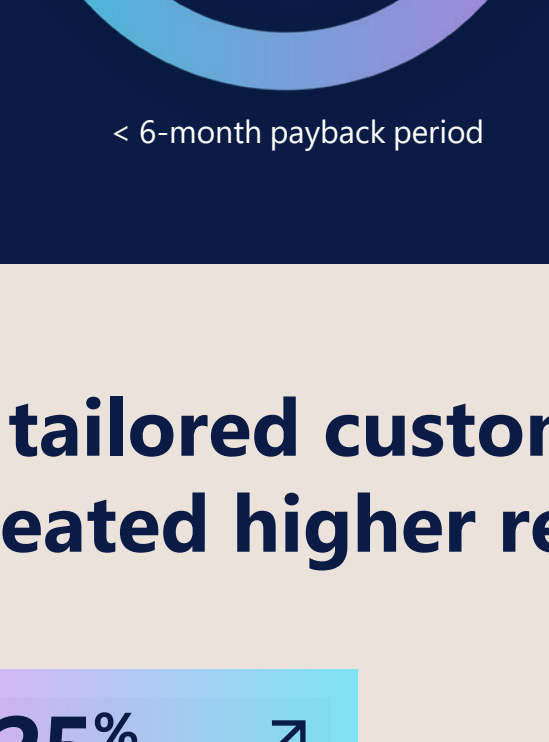


Strategic Gains for Sales Leaders

Maximizing ROI with Dynamics 365 Customer Insights

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

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



ROI achieved through:

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

A tailored customer journey created higher revenue

25% ↑

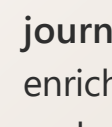
increase in number of customer journeys developed when using Dynamics 365 Customer Insights

15% ↑

increase in revenue per customer journey

\$5.25M

Three-year, risk-adjusted benefit



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

– Director of technology, maritime brokerage firm

Reduced time and expense

75%

time savings on customer journey development

50%

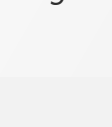
reduction in physical marketing spend

\$120K

annual savings in retired legacy solutions

\$75K

annual savings in marketing agency fees



We met our target for presales in **one day.**"

– Product manager, sports organization

A closer look at total present value of benefits

\$269K

Retired license savings on redundant solutions

\$1.2M

Avoided marketing expenses

\$10.29M

\$5.3M

Increased revenue and profit from improved customer visibility and journey development

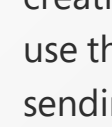
\$3.5M

Marketing and content manager personnel time savings

Empower employees with a simplified solution

Dynamics 365 Customer Insights improved the employee experience through:

- Centralization
- Customization
- Ease-of-use



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

– Product manager, sports organization

Get to know Copilot in Dynamics 365 Customer Insights

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

- ★ Learn more about customers
- 🎯 Create targeted customer segments
- ✍️ Generate personalized content

Copilot in Dynamics 365 Customer Insights allows marketers to:

- 👤 Engage directly with customer data using natural language
- 🔍 Explore, understand, and predict customer preferences using simple prompts
- 🌐 Free the data and analytics team to focus on more creative tasks
- 👤 Create targeted customer experiences and interactions

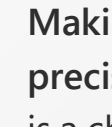
Copilot prompt example:

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

Create simplified, more successful customer journeys with AI

AI reduces complexity and boosts success in these ways:

- ↗️ Improved customization
- ↻️ Automatic hand-off of leads
- AI recommendation for next actions
- 🔄 Auto-updated data



It's really easy for both sales and marketing to see stats and analytics about clients, segments, [and] personas... **Making sure our outreach is precise, exact, and on-point** is a challenge we've been able to overcome with Microsoft Dynamics 365 Customer Insights."

– Director of technology, maritime brokerage firm

Engaging customer experiences can transform business

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

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

Read the full study

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

Learn more

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

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