

Edit

— SALOCIN —



Edit's Microsoft Customer Insights Implementation Proposition





Microsoft Dynamics 365 Customer Insights helps organisations **unify and enrich customer data** from disparate sources and **provides the insights** needed **to deliver personalised customer experiences** at scale.

Edit has 25 years' domain experience, helping organisations achieve a single view of their customers then use this data to improve decision making and customer experience.

Edit's domain experience, combined with our technical expertise, Dynamics Customer Insights and surrounding Azure and Power Platform technology, underpinned by our **#PrivacyFirst** approach, means organisations realise the full potential of their customer data quickly, while still maintaining full control of customer data for data security, governance, and compliance.

Edit's Expertise Throughout the Project Lifecycle

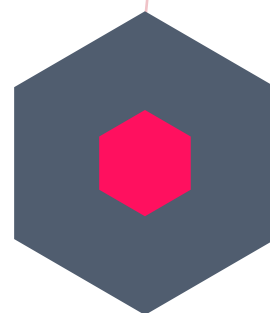
There's a lot more to a successful CI implementation than just integrating systems and data. Edit's team of experts can help throughout the project lifecycle, from project initiation right through to long-term value release.

1.

Scoping and Project Initiation Consultancy

We can help you get your CI project started and heading in the right direction, to deliver quick wins and long-term value. We can provide advisory consulting related to:

- ◇ Business case creation; forecasting the potential financial impact of deploying a CDP based around the three key pillars of "make money", "save money" and "build the brand".
- ◇ Identification of pre-requisites and dependencies, sharing our experiences of how to set a CI project up for success from the beginning, and project pitfalls to avoid.
- ◇ Categorising and prioritising deliverables for the Customer Insights implementation to support marketing and analytics strategy, aligned to how each deliverable unlocks return on investment from CI.
- ◇ Creating a solution roadmap to take a CI project from MVP to aspirational end state, with each stage linked to measurable outcomes to create a self-funding programme of work.



**SCOPING AND
PROJECT INITIATION
CONSULTANCY**

£30k - £50k depending on
services required

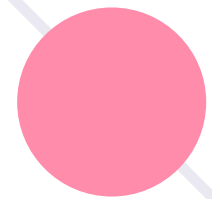


2.

Architecture and Design

We can provide expert services for:

- ◇ Data modelling related to customer and person data, optimising use of Microsoft Common Data Model and making sure data is represented in the way that's going to be most efficient for marketers and analysts to use. Application of BEAM agile data modelling where appropriate.
- ◇ Design of data staging layers, either in Azure Data Lake or Azure SQLDB to optimise CI ingest processes and performance (enabling delta loads where the source system cannot support these).
- ◇ Integrated Cloud Solution Architecture for Customer Insights, especially:
 - Design so that CI compliments an existing or planned enterprise warehouse (especially where Azure Synapse) rather than competes.
 - Optimising integration and use of Azure Machine Learning for bespoke predictive models in CI.
- ◇ Best practice advice for on-going use of CI, particularly where to build and maintain measures when the overall solution architecture includes a data warehouse and BI/MI tools like Power BI.
- ◇ Design of matching strategies and merge strategies to achieve best possible data quality.



CI ARCHITECTURE AND DESIGN SERVICES

£20k - £60k+ (pricing based on scope, highly dependent on data sources and complexity)

Implementation

Whilst just implementing CI by itself isn't enough to deliver valuable business transformation, a competent efficient implementation is the heart of data driven transformation projects. Edit have the skills and experience to be a trusted implementation partner.



CI Implementation Services

Implementations are performed following Edit's Agile methodology and cover all standard CI functionality, from configuring data connections through to training and handover. Implementation effort is highly correlated with the number and complexity of source data entities, and the number and complexity of insight measures required. Typical implementation ranges are:

	PRODUCTION		
PROOF OF CONCEPT Non-production deployment to validate a single hypothesis	SMALL 5 source entities accessed using built-in connectors, matched deterministically, measures and segments configured through interface, use of one built-in model	MEDIUM 10 source entities, some requiring PowerQuery transforms, matched probabilistically, measures and segments configured through Spark SQL, use of three built-in models	LARGE 15 source entities, some requiring Data Gateway, multi-rule matching, complex insights requiring custom Spark SQL algorithms, use of custom predictive models

Software Engineering Services to Support CI Implementation

One of the most compelling advantages of CI is that it's part of such a capable cloud-native ecosystem, being fully integrated with Azure and PowerPlatform family products. Many CI projects have custom requirements that can easily be met with a small amount of custom development using these tools, such as:

- ◇ Build of data staging layers, either in Azure Data Lake or Azure SQLDB.
- ◇ API integrations for real-time data connectivity.
- ◇ Custom ETL processes using Azure Data Factory to enable connectivity with systems where CI does not have a native connector.
- ◇ PowerAutomate flows to trigger business processes based on insights generated in CI.

**AZURE/
POWERPLATFORM
DEVELOPMENT
SERVICES**

Cost dependent on scope and complexity



Customer Insights Plus (CI+)

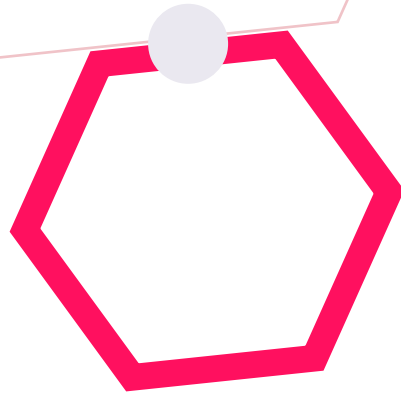
Customer Insights is a highly extensible product. With our experience implementing CI across a range of industries and use cases, we have identified several areas where extending extending the core product would add substantial value and not conflict with the Microsoft product roadmap. We have built and productised these enhancements to make them easy to deploy and maintain. CI+ modules include:

- ◇ Data auditing and change tracking to allow tracking change over time, e.g. trend in churn score, historical values for source entity attributes.
- ◇ Person name data quality scoring to merge and persist the best name data.
- ◇ Enhanced matching using reference data sets (name synonyms, obscenity checking).
- ◇ Pre-unification address validation and scoring for improved match rates and improved overall data quality.
- ◇ Enhanced system reporting (performance monitoring).



CI+

See separate datasheet on CI+



Unlocking Value from Technology Investments

A successful technical go-live is just the first step to achieving the potential return on investment. The new data and insights need to be used and applied in everyday operations. Organisational inertia can lead to slow adoption/use of new capabilities – we call this the “so what” factor. Our advisory consulting services can make sure potential value is realised not just at launch but on an ongoing basis

- ◇ Help organisations understand what they need to do to actually get the value they expected from implementing a CDP.
- ◇ Growing and expanding – turn a roadmap from a theoretical document into actionable plans on where to go next with data driven transformation.
- ◇ Ongoing BAU support – system monitoring, alerting services, performance optimisation.
- ◇ Outcome-led training.
- ◇ Skills training to create a “centre of excellence” for Customer Insights.

POST-IMPLEMENTATION CONSULTANCY SERVICES

Cost dependent on scope and complexity

Where have we done it before

