

Revolutionize Your Customer Engagement with AI

HITACHI

Your **2-Week** Quick Starter Package for **Microsoft Dynamics 365 Customer Insights - Journeys**

The Offer

In today's competitive market, businesses need intelligent solutions to truly understand and engage their customers. Our 10-business-day Quick Starter Package for Microsoft Dynamics 365 Customer Insights, powered by AI, is designed to fast-track your marketing strategy through AI-generated content and predictive analytics. This streamlined implementation sets up Customer Insights – Journeys, enabling your team to deliver personalized experiences and make smarter, data-driven decisions faster.



Why Hitachi Solutions?

Hitachi Solutions is a global systems integrator with leading capabilities in Microsoft solutions and technologies. Our professionals combine advisory services, industry and technology expertise, and implementation excellence that encompass our customers' people, processes, business applications, and technologies to support and accelerate their data and business system modernization initiatives.

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Week 1: Setup and Configuration

Day 1: Discovery and Planning

Objective: Identify key objectives and customer touchpoints.

Activities:

- Gather business goals and technical requirements with discovery sessions.
- Define key success metrics for customer journeys.

Day 2: Feature and Functionality Demo

Objective: Demonstrate the capabilities of Customer Insights – Journeys.

Activities:

- Showcase AI-generated content (Copilot) and predictive lead scoring.
- Provide examples of potential customer journey scenarios.

Day 3: Configure Customer Journey

Objective: Set up a personalized customer journey using Copilot.

Activities:

- Create a journey based on AI-driven prompts.
- Implement dynamic content tailored to specific segments.

Day 4: Configure Form/Landing Page

Objective: Develop a form or landing page for customer interaction.

Activities:

- Design a "Contact Us" form or landing page.
- Integrate with the customer journey for seamless interaction.

Day 5: Configure Segment

Objective: Set up a customer segment using AI-driven prompts.

Activities:

- Define segment criteria based on predictive analytics.
- Integrate segment data into customer journeys.

Week 2: Segmentation, Integration, and Training

Day 6: Enable Dashboards and Activities

Objective: Set up dashboards and interaction capabilities.

Activities:

- Activate out-of-the-box dashboards for insights visualization.
- Configure activities like email, phone calls, tasks, appointments, and notes.
- Link activities to CRM records for comprehensive tracking.

Day 7: System Settings and Security Configuration

Objective: Ensure foundational system settings and security.

Activities:

- Set up general, format, and auditing settings.
- Configure security roles and permissions using out-of-the-box roles.

Day 8 and 9: User Training

Objective: Equip users with knowledge to utilize the system effectively.

Activities:

- Conduct training sessions focused on system usage and best practices.
- Offer hands-on exercises to reinforce learning.

Day 10: Final Review and Go Live Preparation

Objective: Prepare for final deployment and ensure readiness.

Activities:

- Review system configurations and user feedback.
- Address any final adjustments before go-live.

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