



Empowering Business Applications with AI

Harness Your Data for a
Complete Customer View

Hitachi Solutions

- 03** Introduction
- 04** Why Is a Complete View of the Customer Important?
- 06** How You Can Achieve a 360 Customer View
- 09** What You Need
- 12** Where You Should Start
- 17** Who You Can Partner With

Introduction

The era of AI is here, and your customers expect more — are you keeping pace?

78%

of respondents in a recent survey said their organizations use AI in at least one business function and, for the first time, most of them reported using AI in more than one business function.¹



Every business leader must understand the impact AI can have across their organization, from collecting and analyzing data to automating business processes and driving innovation. If you're looking to realize that potential and ensure your organization is set up for future growth, know that the value of AI isn't just about finding efficiencies or generating content — it's being able to access the right data to build a complete view of your customers.

99%

of all data has been produced in just the last 10² years and global data creation is forecasted to triple, exceeding 394 zettabytes by 2028.³

The amount of data that's available today about your customers far exceeds what was available even just a few years ago. So, while it is important to collect data about your customers — from where and how they connect with your organization to their interactions and potential challenges — it is the type of data you collect and its relevance to your business that matters.

Across B2B and B2C industries, the real power of AI is its ability to collect, analyze, and utilize that "right type" of data to create a 360-degree view of your customers, so you can understand who they are and what they need.

Here's what you need to know about building that customer view, what tools you need to collect the necessary data, and how to get started.

¹ [McKinsey](#). The state of AI: How organizations are rewiring to capture value

² [CMSWire](#). 99% of Data Has Been Produced in the Last 10 Years

³ [Statista](#). Volume of data/information created, captured, copied, and consumed worldwide from 2010 to 2023, with forecasts from 2024 to 2028.

Why Is a Complete View of the Customer Important?



Personalized and connected experiences for your customers have a measurable impact on customer satisfaction (CSAT), loyalty, wallet share, and operational productivity. Across industries, customers expect fast, relevant, and contextual experiences — and the companies that deliver these experiences consistently outperform their peers.

Customers expect that every touchpoint — whether it's with sales, customer service, or marketing — remembers who they are, what they care about, and where they left off.

But a total customer view is more than the ability to meet these expectations.

Without it you risk:

- Delivering fragmented, inconsistent interactions
- Missing opportunities to cross-sell or upsell
- Slow issue resolution and decreased customer satisfaction
- Lower employee productivity due to poor data access

All of this translates into your ability to retain and grow customer relationships, optimize revenue, and reduce operational costs. Having a complete, intelligent view of your customers will enable you to:

- Drive stronger loyalty and customer lifetime value
- Increase operational efficiency and employee effectiveness
- Differentiate meaningfully in crowded markets

Why do many organizations struggle to harness their customer data? Because each department — from marketing and sales to service and finance — collects its own customer data, often using different systems with different identifiers. As a result, a single customer might appear in multiple systems with multiple identities.

This fragmentation makes it nearly impossible to deliver the seamless experiences customers expect. And, more importantly, it prevents your teams and your business applications from leveraging the full customer journey.

12

different enterprise technologies are used on average by organizations to support their customers.⁴

Here's where AI helps you.

Building and operating an AI platform enables you to:

- Access all relevant customer data across the enterprise
- Reconcile identities to create a single source of truth
- Organize and analyze data at scale
- Deliver insights and actions directly within workflows

This is using AI where it matters most: bringing together disconnected data to build a coherent, living view of your customer. Once you have that 360-degree customer view, you're able to truly enable intelligent decision-making and automation. Even better, that comprehensive view continues to inform and improve your use of AI and which data you collect, supporting continuous growth and improvement.

⁴ [Deloitte](#). Know your customer: Enable a 360-degree view with customer identity & access management

How You Can Achieve a 360 Customer View



When you bring all your customer data together, power it with AI, and embed it into your business processes you're able to treat every customer like your only customer.

But delivering that level of personalized, connected experience requires a unified, intelligent approach to customer data.

01

Break Down Data Silos Across Systems

Sales, service, marketing, and other customer-facing teams often operate in their own systems, each with partial and inconsistent customer records that are often siloed from back-office systems — billing, finance, fulfillment, supply chain, etc. Add in additional sources of data from smart devices, wearables, and social media and the amount of data available on any single customer can be overwhelming. Breaking down data silos in a centralized system that can pull in and organize data allows you to treat customer data as an enterprise-wide asset — rather than the property of a single department.



72%

of leading organizations cite managing data as one of the top challenges preventing them from using AI.⁵

⁵ [McKinsey](#). The data dividend: Fueling generative AI

02

Unify and Clean Your Data

Every member of your organization needs to be able to understand and trust that 360-degree view of your customers. Otherwise, you're risking oversights, mistakes, and misunderstandings. Just integrating data isn't enough — it must be clean, consistent, and unified to act as a single source of truth that any system or employee can rely on. That means resolving identities across systems, normalizing formats, removing duplicate entries, and enriching records with contextual information.

03

Use AI to Build Intelligence into Every Interaction

Ensure your AI tools do not just sit on top of your data; AI should work across your applications and core systems to:

- Analyze patterns
- Surface insights in real time
- Predict customer needs
- Trigger intelligent actions

With AI-powered analytics, organizations can continuously refine the customer view — learning from every interaction and transaction to improve personalization, resolve service issues faster, identify potential sales opportunities, and anticipate future needs.

04

Innovate Quickly, Securely, and at Scale

To stay competitive, speed matters. That's why your data architecture and AI strategy must be designed for agility. Prioritize solutions that:

- Support rapid deployment with minimal disruption
- Leverage low-code or no-code environments so business users can innovate without waiting on IT
- Are optimized for cloud environments to scale effortlessly
- Maintain data governance and control, so your customer trust is never compromised

Following the explosion of generative AI over the last few years, there's been excitement around how AI will revolutionize every industry — but what if you're not seeing the benefits you expected?



A few things trip up most organizations:

- Being afraid to make the investments needed to fully utilize AI.
- Developing small proofs of concept that don't go anywhere.
- Not having an understanding of what success looks like.

You can't have AI just to have AI, you need to understand how AI impacts your KPIs that define success. You need to make the right investments in systems and tools that will bring the efficiencies and cost reductions you're looking for. And you need a partner who can help you develop a long-term strategy.

What You Need



In an environment where organizations are expected to do more with less, stay ahead of competition, and deliver standout customer experiences, organizations should be rethinking how they are harnessing the power of their data and technology.

AI presents a powerful opportunity to create a complete, actionable view of the customer that drives real business value. But how do you make your 360-degree customer view as complete as possible to help eliminate manual data entry while optimizing process flows and integrations?

While a modernized data platform that effectively unifies data is a must have, organizations can find real value in the tools and resources they already have.

The right platform and architecture.

Legacy tools and processes often have difficulty keeping up with the sheer volume and velocity at which data is created. Modern, cloud-based systems are designed to scale to better host, ingest, and model data. AI tools such as Microsoft Copilot can digest unstructured data from documents and help get it into your systems.

The right integrations.

Modern business applications often come embedded with powerful AI capabilities — yet many organizations underutilize them. Rather than investing in entirely new applications, assess:

- What capabilities exist within your current tools and applications
- Where integrations can be deepened or configured for smarter use
- Which features (e.g., low-code, AI assistance) can be unlocked without custom development

The right governance.

As you lean into AI, governance cannot be an afterthought. One of the most strategic decisions you'll make is how and where your AI is trained. Owning your data and your models gives you a competitive edge, protects your customers, and your brand. Be sure you can answer the following questions:

- Are we training our AI models on our data — or are we feeding insights into models shared with competitors?
- Do we have full control over where data flows, who can access it, and how it's used?
- Are we complying with data privacy, regulatory, and ethical standards?

Scenario:

Using digital technology is more than just having a website where customers can make appointments, open accounts, place orders or earn points. If you're not updating customer demographic data or offering suggestions based on their purchase history, then you're not adding value. If anything, you could be creating negative customer experiences.

When your customers call about an issue, they expect that you will already know everything you need to help them. At the very least, they'll expect to only need to explain something once. Everyone in your organization needs to have readily available information about any customer's history and your relationship with them.

Think about going into the CRM to see why a customer cancelled a project two years ago. You want to understand if the cancellation was due to budgetary constraints or if there was a lack of satisfaction. After tracking down notes from the previous account manager, you still can't make heads or tails of how the project ended or determine if the project ended on good terms. You're already on the back foot in restarting that relationship.

If your data is siloed, then it's not being effectively utilized across your entire system. And there might be different ways of approaching your existing data to find new insights. Sentiment analysis, powered by Natural Language Processing (NLP) models, identifies positive, neutral, and negative sentiment in customer interactions to understand what people think of your brand or topic and can highlight your strengths and weaknesses.



With AI tools, you're always prepared.

Where You Should Start



Integrating AI into your business is not a one-size-fits-all effort — it requires thoughtful planning, strategic alignment, and a clear understanding of where your organization has been, where it stands today, and where it's headed.

Here's a framework for getting started — and getting it right.

01

Start with Context: Where You've Been

Every organization's transformation journey is different. To successfully implement AI, you need to examine your digital history.

- Which past modernization efforts have worked — and which haven't? Learn from earlier missteps in data collection, siloed systems, or failed pilots.
- Who holds the data and insights internally? Often, someone in your organization already has the information or access you need — you just need a strategy to connect it.
- What do you want to learn from your data, and how will it impact your customers? AI is only as useful as the business problems it solves. Define your use cases with the customer in mind.

KEY TAKEAWAY

Build your AI architecture around what matters most, not just what's possible. A well-designed system starts with asking the right questions.

02

Evaluate the Present: Where You Are

Before selecting a solution or platform, step back and align AI initiatives with your broader business practices.

- Find your "why." What's the core problem you're trying to solve? Efficiency? Personalization? Revenue acceleration?
- Create a unified view of the customer.
AI can only work effectively if it has access to complete, cross-functional data. Identify all customer data points — including sales, service, marketing, supply chain, and finance.
- Empower your employees. When you integrate AI across systems, you also enable AI to work for your internal teams. Ensure you're streamlining workflows, surfacing insights, and improving decision-making.

KEY TAKEAWAY

You don't need to reinvent your organization; just activate the data and systems you already have to make smarter, faster, more informed decisions.

03

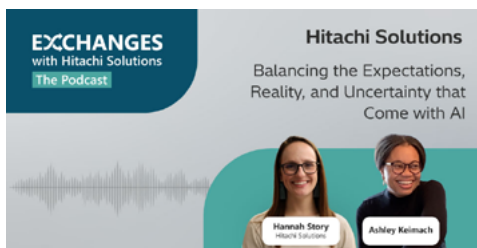
Plan for the Future: Where You're Going

AI adoption isn't a single event — it's a long-term investment in agility, innovation, and competitive edge.

- Future-proof your architecture. Choose flexible platforms that can evolve as your needs and technologies change.
- Prioritize data governance. The security, quality, and accessibility of your data are foundational to growth. Strong governance ensures trust, transparency, and compliance.
- Know what access looks like. Just because data is unified doesn't mean it's open to everyone. Role-based access, guardrails, and accountability are critical to scale securely.

KEY TAKEAWAY

Future growth depends not only on what AI can do today, but on how you manage and safeguard your data for tomorrow.



PODCAST

**Balancing the Expectations,
Reality, and Uncertainty that
Come with AI**

[Listen Now](#)

What *Not* to Do When Integrating AI into Your Business Applications

- Don't cling to "how it's always been done." AI can only create value if you're willing to rethink processes, data strategies, and organizational structures.
- Don't focus only on the horizon. Big visions are great, but success comes from defining what matters now, solving for it, and scaling from there.
- Don't get stuck in pilots. Proof-of-concepts are useful, but unless you scale to the actual size of your enterprise, you'll never realize AI's true impact.
- Don't let budget fears stall you. Strategic investments now lead to future savings, faster operations, and stronger customer relationships. Platforms like Microsoft Power Platform offer scalable, cost-effective paths to transformation.
- Don't limit change to leadership. AI adoption must include your front-line personnel. Change fails when those who use the tools daily aren't consulted, equipped, or trained properly.
- Don't expect perfection on day one. AI systems improve with feedback and time. Treat your launch as the start of continuous improvement, not the finish line.

CASE STUDY

Financial Services

This financial institution has several lines of business: investment banking, real estate, wealth management, and more. Each business unit had its own systems, its own processes, and its own view of the customer for a fractured picture of client relationships.

To move their business forward, they partnered with Hitachi Solutions to prioritize creating a **360-degree view of their customers** — not by starting from scratch, but by connecting and unifying the data they already had.

Here's how we approached it:

- 1. Connected data from across business** lines into a centralized CRM platform, enriched by AI capabilities.
- 2. Used AI to pull, structure, and harmonize data** from various internal systems — meeting notes, relationship history, engagement activity, and financial transactions.
- 3. Enabled natural language querying**, so team members could ask AI questions like:

"Show me all the relationships we have at this organization across all business units."

"Where have my reps been most active in the last 30 days?"

"Summarize my last five client meetings with this client."



This level of insight — previously buried in email threads, meeting notes, and disconnected databases — was now instantly available, accessible, and actionable. With their AI-enabled customer-360 view in place, the institution unlocked measurable value across the organization:

Improved Sales Effectiveness: Reps spent less time hunting for data and more time engaging with clients meaningfully.

Faster Decision-Making: Managers could see engagement trends in real time and deploy resources more strategically.

Stronger Client Relationships: Teams delivered more personalized, timely, and coordinated service, deepening customer trust and loyalty.

Enhanced Productivity: AI helped eliminate manual data gathering and meeting prep, streamlining workflows and freeing up time for higher-value work.

CASE STUDY

Manufacturing

A large national manufacturer operates multiple plants independently across the country to cater to the unique needs of their regions. While this approach provided the necessary regionalization, this operating model led to fragmented data and a fragmented view of their customers. This led to instances where a customer was contacted by multiple sales representatives from different product lines resulting in a less-than-ideal customer experience.

Recognizing the need to consolidate data into a single view of the customer, the organization partnered with Hitachi Solutions to develop a new customer-360 application. This application allows internal teams to quickly retrieve data on customer history, providing the sales and operations teams with a single source of truth.



This initiative resulted in:

Greater Customer Convenience:

The creation of a self-service portal now allows customers to easily view order data and shipping information.

More Efficient Customer

Communication: Consolidated enterprise data across siloed systems streamlined sales and operations outreach activities.

Increased Potential Market Share:

The manufacturers are now able to better leverage data, streamline internal efforts, and creating AI-enhanced tools for their customers.

Who You Can Partner With



Achieving a truly effective 360-degree view of your customer requires more than just technology — it takes strategic alignment, data orchestration, process redesign, and above all, the right expertise in the right places. That's why organizations need a reliable, experienced partner to guide them through the complexity of AI transformation.

Hitachi Solutions is that partner.

End-to-End Business Transformation

- Build your business case with real ROI
- Launch meaningful POCs that don't stall out
- Scale AI across your enterprise to drive measurable value

Customer 360 as a Foundation

- Connect siloed systems to build a complete customer view
- Use AI to surface insights across all business units
- Empower all departments, lines of business, and leadership with real-time intelligence

Smart, Scalable Architecture

- Leverage your existing Microsoft investments and applications from Microsoft 365 to Dynamics 365 to Power Platform to Copilot to Azure
- Integrate AI quickly without costly overhauls
- Adjust AI and data models in real time to stay responsive

Measurable, Evolving Success

- Align AI with your business KPIs to help you measure success
- Enhance metrics like AHT or FCR for next-generation service experiences
- Partner on governance, security, and data ownership every step of the way



You know your customers.

We know how to harness your data and technology to serve them better. With Hitachi Solutions, you get more than a solution — you get a long-term partner in transformation.

Ready to take the next step towards empowering your business applications with AI?

Learn more about one of our many ways to get started in our [2-Week Assessment](#) to help accelerate your journey or simply [contact us](#) today to set up a conversation.



Contact Us

Hitachi Solutions is consistently recognized by Microsoft for our excellence in delivery and innovation. As a Microsoft Partner of the Year Award winner, our teams are deeply embedded within Microsoft's product ecosystem and engineering roadmaps, ensuring that we bring forward-looking insight and early access to emerging capabilities.

Visit our website or get in touch with our team to discover how we can help you transform your business applications, accelerate meaningful AI adoption, and achieve measurable business outcomes—your way.

global.hitachi-solutions.com