

A woman with voluminous, curly blonde hair is smiling and looking down at a tablet computer she is holding with both hands. She is wearing a dark blue turtleneck sweater and a patterned skirt. The background is a bright, out-of-focus office space with framed pictures on the wall.

# MICROSOFT DYNAMICS 365 CUSTOMER INSIGHTS IMPLEMENTATION AT SCOTTISH WATER

## Scottish Water launches Microsoft Dynamics 365 Customer Insights to significantly improve communications with customers and management of campaigns

Scottish Water is the public water company that looks after Scotland's most precious natural resource. From source to tap, Scottish Water keeps its customers supplied with world-class water, and looks after wastewater services across the country. With some 2.6 million household customers under its care, Scottish Water are keen to have an effective external communications tool in place to be able to engage directly with people who sign up to receive their updates.

The Corporate Affairs team at Scottish Water manage all external communications and events for Scottish Water customers. This includes sending newsletters for various campaigns they run, such as Your Water Your Life, as well as running events to attract new sign-ups who would like to receive updates about their campaigns. With no enterprise-level marketing tool available to them, they faced several issues including:

- Newsletter communications relied on external agencies for content design
- Segmentation of customers was done externally to their existing Dynamics 365 Customer Service solution
- No analytics to help identify campaign or content performance
- No automation in place for managing customer subscriptions
- No visibility of marketing communications sent to customers in their CRM

### Overview:

**Client:** Scottish Water

**Region:** UK

**Sector:** Energy and Utilities

### Client Challenge:

The Corporate Affairs team at Scottish Water had no enterprise-level marketing tool available to them to support their external communications strategy.

### Solution:

Capgemini, working together with Microsoft, streamlined their external customer communications by fully implementing Dynamics 365 Customer Insights in the space of 4 months.

### Benefits:

- No longer reliant on external agencies for newsletter communication campaigns design
- Enhanced access to newsletter communication campaign analytics to identify campaign and content performance and guide future content decisions
- The team now have full access and visibility of all customer communications and automation in place for managing customer subscription preferences

## Ensuring success together with Microsoft and Scottish Water

With a view to improving the current service in place, Scottish Water began to explore what systems were available on the market that could deliver what they were looking for. In June 2022, Capgemini's Microsoft Application and Cloud Engineering (MACE) team started working with Scottish Water to streamline their external customer email communications by implementing Microsoft Dynamics 365 Customer Insights.

Prior to the MACE team starting, Microsoft had engaged directly with Scottish Water to discuss the features and benefits of Dynamics 365 Customer Insights. Working together, Microsoft and Capgemini account managers, application consultants, and software engineers, advised Scottish Water on the structure of the design as well as the implementation of the Dynamics 365 first-party app. They supported Scottish Water in the installation and configuration of the solution and advised on best practices for using the app to gain the most benefit.

The Capgemini team planned and ran design workshops to identify the correct configurations required, and to clarify user needs, supporting Scottish Water throughout its journey to deliver its own newsletter campaigns. The project included installing and configuring the solution in all client environments and providing comprehensive user acceptance testing (UAT) and training to the Corporate Affairs team to ensure adoption, and that they are able to create their own newsletter emails and other content going forward. The background research laid the foundations for this project and ensured that it ran smoothly from start to end, resulting in a swift conclusion within the space of 4 months.

## Empowering the Scottish Water communications team


With the new Dynamics 365 Customer Insights implementation, Scottish Water is now able to create its own marketing forms and email templates to create personalised newsletter communications in-house, as well as manage its own content library. The solution also provides an integrated customer sign-up and segmentation feature that is integrated with their website. This means customers can now manage their own subscription preferences without Scottish Water needing to update data manually, enhancing adherence to GDPR. Personalisation and insight were key requirements to enable the Corporate Affairs team to start optimising their communications. With emails going through Dynamics 365 Customer Insights, the team now gains insights on campaign performance through metrics such as open rates and clicks, as well as bounces to understand how many customers are engaging with their content. Also, with features such as A/B testing, they can now complete tests to find out what content resonates most with their customers.

With the existing Dynamics 365 Customer Service solution in place to capture customer contacts and support their needs, using Dynamics 365 Customer Insights means Scottish Water

now benefits from full visibility of all communications that have been sent to their customers. This means their Customer Engagement Advisers can better serve customer needs, as they have a full 360 view of the customer and are able to see which newsletters a customer has received and engaged with.

*"The project was a success which resulted in the first Dynamics 365 Customer Insights app delivered in the UK by the Capgemini MACE team. Following initial demos and conversations with Scottish Water, the delivery of the app was handed over to Capgemini to deliver. Capgemini did a great job taking Scottish Water through the features and benefits of Dynamics 365 Customer Insights and have ensured Scottish Water are set up for success, not only for their current use of the tool, but for future use cases as well".*

**Julia Whittle,**  
Account Manager, Microsoft.

 ***The power to be able to engage directly with customers who sign up to receive our updates is a key element of our campaign activity. We started from scratch to build a database of customer details and the ability to move from very manually-driven processes to a highly effective automated platform like this brings so many benefits. With added capacity around insight and customer journeys, it's a really valuable tool which will help us to shape content, and build on engagement levels going forward."***

**Lorna Hamilton,**  
Brand and Marketing Manager, Scottish Water



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