MB 280T03 A: Design and Deliver Powerful Customer Experiences with Dynamics 365 Customer Insights

Days: 1

Prerequisites: Students should have knowledge in basic marketing principles. Students should be familiar with the Dynamics 365 customer experience suite, including Dynamics 365 Sales and Dynamics 365 Customer Insights. They should also have experience with basic model-driven application configuration.

Audience: This course is designed for IT or marketing professionals who want to learn how to leverage Dynamics 365 Customer Insights for their organizations.

Description: Dynamics 365 Customer Insights helps organizations deliver exceptional experiences personalized to every customer. In this course, students will learn how to work with key features of Customer Insights – Data and Customer Insights – Journeys. First, students will learn about the business value of using a customer data platform. They will ingest data into Customer Insights – Data, create unified customer profiles, and create segments to help target specific audiences. Then, students will build impactful and personal experiences using Customer Insights – Journeys. They will create marketing assets like emails and text messages and deliver them via segment- and trigger-based journeys.

Course Objectives:
This workshop teaches students how to:
- Configure core features of Dynamics 365 Sales, including lead/opportunity setup, product catalog and pricing, and sales order processing.
- Manage the full sales lifecycle, from lead creation through opportunity and quote management.
- Establish forecasting and goal-management frameworks, and perform analytics using Power BI and built-in tools.
- Implement productivity-enhancing features such as Sales Accelerator, Sales Insights, and Microsoft Copilot for Sales.
- Enable mobile and cross-platform collaboration by deploying Dynamics 365 Sales to mobile, Outlook, and other integrations.

OUTLINE:

MODULE 1: GET STARTED WITH MICROSOFT DYNAMICS 365 CUSTOMER INSIGHTS
- Understand core concepts of Customer Insights – Data (profiles, activities, measures, segments).
- Navigate the Customer Insights interface and identify key capabilities.
- Explore how unified customer data supports personalized engagement initiatives.

MODULE 2: INGEST DATA INTO CUSTOMER INSIGHTS – DATA
- Connect to and import data from various sources.
- Map, transform, and standardize data during ingestion.
- Validate data quality and readiness for unification.

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MODULE 3: UNIFY DATA IN CUSTOMER INSIGHTS – DATA
PARTICIPANTS WILL BE ABLE TO:
- Define matching/merging rules to unify customer records.
- Configure data matching strategies to resolve duplicates.
- Build a unified customer profile that aggregates attributes and activities.

MODULE 4: WORK WITH DATA IN CUSTOMER INSIGHTS – DATA
PARTICIPANTS WILL BE ABLE TO:
- Create, manage, and enrich customer profiles with measures and activities.
- Build segments based on attributes, behaviors, and predictive scoring.
- Use insights to support targeted marketing, sales, and service scenarios.

MODULE 5: ENRICH DATA IN CUSTOMER INSIGHTS – DATA, INCLUDING WITH AI
- Apply enrichment techniques to supplement customer data.
- Configure AI-generated predictions such as churn, product recommendations, or propensity models.
- Use enrichment insights to tailor customer journeys and messaging.

MODULE 6: WORK WITH EXTERNAL CONNECTIONS IN CUSTOMER INSIGHTS – DATA
- Configure connections to external destinations such as Dataverse, Azure Data Lake, or Power Platform.
- Export insights and segments for downstream workflows.
- Integrate Customer Insights data with analytics and automation tools.

MODULE 7: ADMINISTER CUSTOMER INSIGHTS – DATA
- Set up and manage environments, permissions, and configurations.
- Monitor data processing health and system performance.
- Implement governance and compliance requirements.

MODULE 8: FOUNDATIONS OF DYNAMICS 365 CUSTOMER INSIGHTS – JOURNEYS
- Navigate the Customer Insights – Journeys interface.
- Understand key marketing concepts: real-time journeys, triggers, channels, consent, segments, and analytics.
- Identify features that enable personalized, multi-channel engagement.

MODULE 9: BUILD SEGMENTS AND DEFINE ATTRIBUTES
- Create static and dynamic segments using attributes and behavioral data.
- Use logical expressions, filters, and real-time triggers to define audiences.
- Align segments to specific marketing goals and journeys.

MODULE 10: AUTHOR CONTENT IN DYNAMICS 365 CUSTOMER INSIGHTS – JOURNEYS
- Build marketing assets including emails, forms, pages, SMS messages, and push notifications.
- Work with the drag-and-drop editor to create consistent, branded content.
- Use personalization tokens and conditional content.

MODULE 11: CREATE REAL-TIME CUSTOMER JOURNEYS IN CUSTOMER INSIGHTS – JOURNEYS
- Build multi-step real-time journeys triggered by events, segments, or behaviors.
- Configure branching logic, wait conditions, and channel selection.
- Monitor journey performance and optimize engagement paths.

MODULE 12: MANAGE CONSENT IN CUSTOMER INSIGHTS – JOURNEYS
- Configure customer consent and subscription management.

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- Manage compliance with privacy and communication regulations.
- Apply consent rules across channels and journeys.

MODULE 13: BUILD ANALYTICS WITH CUSTOMER INSIGHTS – JOURNEYS

- Use built-in analytics dashboards to evaluate journey, message, and segment performance.
- Interpret metrics such as deliverability, engagement, conversions, and throughput.
- Apply insights to improve customer experience strategy.

MODULE 14: ADMINISTER CUSTOMER INSIGHTS – JOURNEYS

- Manage system-wide settings, roles, permissions, and environments.
- Configure data protection, compliance features, and channel providers.
- Oversee capacity, monitoring, and troubleshooting tasks.