Microsoft Dynamics 365 Customer Insights: MB-260T00

Course Overview

Dynamics 365 Customer Insights - Data specialists implement solutions that provide insight into customer profiles and that track engagement activities to help improve customer experiences and increase customer retention. In this course, students will learn about the Dynamics 365 Customer Insights - Data solution, including how to unify customer data with prebuilt connectors, predict customer intent with rich segmentation, and maintain control of customer data. This course begins with importing and transforming your customer data and culminates with extending your customer data platform solution into the Power Platform and Dynamics 365 applications.

Audience Profile

Candidates should be familiar with Dynamics 365 Customer Insights - Data and have firsthand experience with one or more additional Dynamics 365 apps, Power Query, Microsoft Dataverse, Common Data Model, and Microsoft Power Platform. They should also have working knowledge of practices related to privacy, compliance, consent, security, responsible AI, and data retention policy.

Prerequisites

- Clean, transform, and ingest data into Dynamics 365 Customer Insights.
- Create a unified customer profile.
- Work with Dynamics 365 Audience insights.
- Enrich data and predictions.
- Set up and manage external connections.
- Administer and monitor Customer Insights.

Prerequisites

You should have a general understanding of Designing and Implementing a Data Science Solution on Azure (DP-100) and Azure Data Factory Training: Designing and Implementing Data Integration Solutions.

Before attending this course, students must have:

- Familiarity with Dynamics 365 Customer Insights
- Firsthand experience with one or more Dynamics 365 apps, Power Query, Microsoft Dataverse, Common Data Model, and Microsoft Power Platform

Duration: 24hrs (8x 3hrs)

Course Outline

Module 1: Get started with Dynamics 365 Customer Insights

Get started with Dynamics 365 Customer Insights and learn how to gain insights to your customers.

Lessons

- Introduction
- Dynamics 365 Customer Insights
- Work with demo data
- Identify your audience
- Consume Customer Insight data
- Knowledge check

Module 2: Ingest data into Customer Insights

In this module, Customer Insights ingests data from all your different data sources and unifies them into a single customer profile. From within the customer profile, you can track data across different demographics, and identify trends based on key data you want to track.

Lessons

- Introduction
- Import data sources using Power Query
- Clean, transform and load data
- Connect to a common Data Modal
- Connect to a Microsoft Dataverse
- Work with data sets
- Refresh data sources
- Export data
- Knowledge check

Module 3: Create a unified customer profile in Dynamics 365 Customer Insights

In this module, we will learn how Dynamics 365 Customer Insights is an intuitive and flexible customer data platform (CDP) that helps you unlock insights and build a deeper understanding of your customers. In this module, you'll learn about creating a unified customer profile in Customer Insights.

Lessons

- introduction
- Define source fields
- Define duplicate record settings
- Define matching conditions
- Create a unified customer profile
- Exercise – Create a customer Insight instance, ingest data, and unify data
- Knowledge check

Module 4: Work with Dynamics 365 Customer Insights

In this module, we will learn how Customer Insights ingests data from all your different data sources and unifies them into a single customer profile. In this module, learn about working with Customer Insights.

Lessons

- introduction
- Configure searching and filtering indexes
- Define relationships and activities
- Work with measures
- Segmentation
- Get suggested segments
- Segments insights
- Use Customer insights for a complete solution
- Knowledge check

Module 5: Enrich data and predictions with Customer Insights

In this module, we will learn how to Enrich your data with other data sources and use AI to make predictions based on historical data

Lessons

- Introduction
- Enrich data
- Brand and interest enrichment
- Use enrichment services
- Work with predictions
- Predict subscriptions churn
- Use machine-learning models
- Knowledge check

Module 6: Manage external connections with Customer Insights

Learn how to manage external connections with Customer Insights

Lessons

- Introduction
- Export Customer Insights data
- Display customer data in Dynamics 365 applications
- Use Customer Insights with Microsoft Power Platform
- Use Customer Insights with Azure Synapse
- Use Customer Insights APIs
- Knowledge check

Module 7: Configure and administer Customer Insights

In this module, we will learn how to Use Customer Insights to administer permission configuration, environments, and system processes.

Lessons

- Introduction
- Create and set up environments
- System process status
- Schedule system refreshes
- Set up user permissions
- Knowledge check