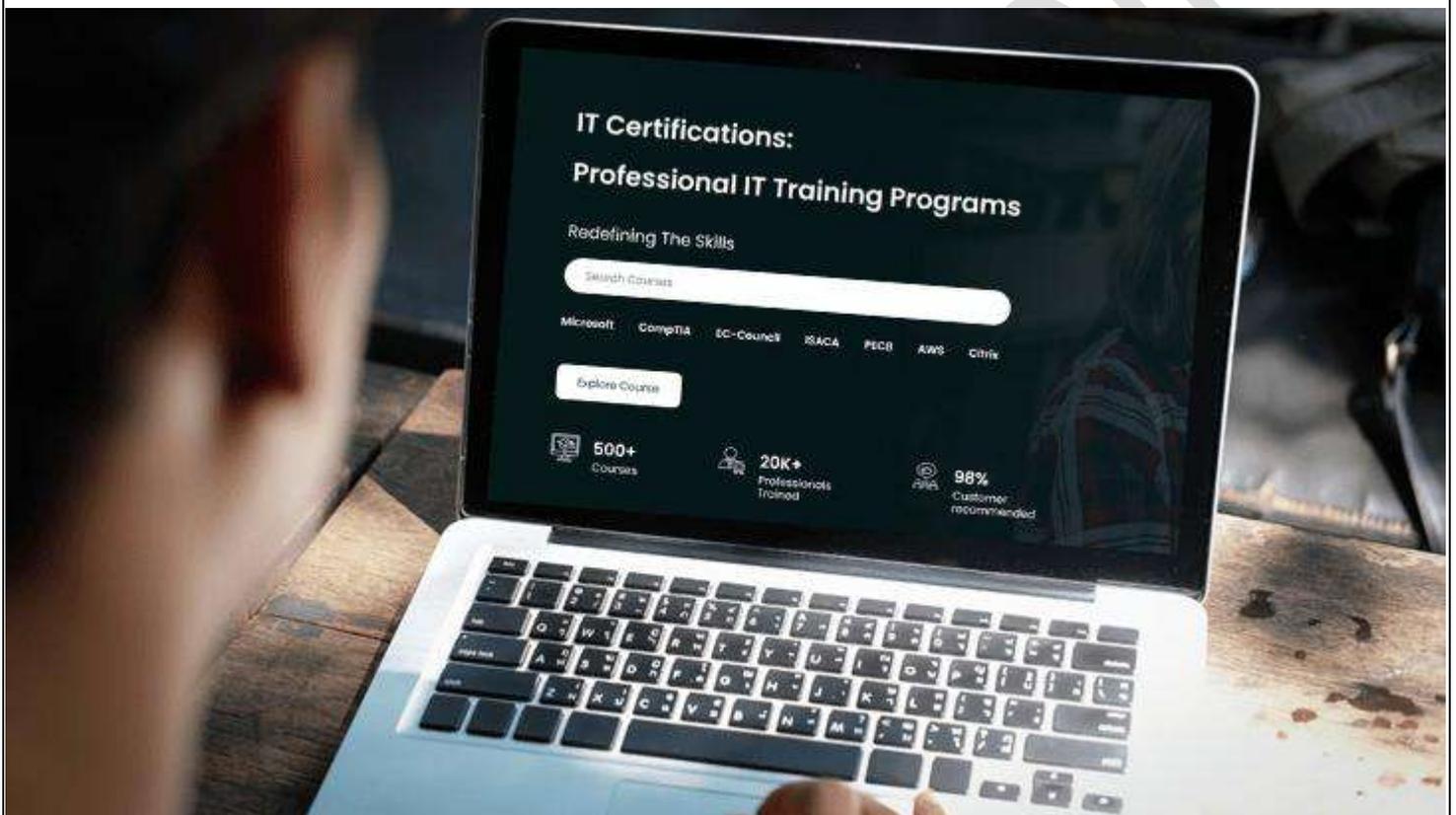




Redefining The Skills



## **MB-280T03: DESIGN AND DELIVER POWERFUL CUSTOMER EXPERIENCE WITH DYNAMICS 365 CUSTOMER INSIGHTS TRAINING**

**Duration: 1 Day**

### **Course Description**

MB 280T03: Design and Deliver Powerful Customer Experience with Dynamics 365 Customer Insights Training deals with key concepts like mastering data integration techniques. This course is primarily focused on advancing the understanding of real-world scenarios in order to improve customer satisfaction.

This course is part of a four-course series (MB 280T01-T04) and aligns to the MB 280 certification exam.

- [MB 280T01: Configure Dynamics 365 Customer Experience Model-Driven Apps Training](#)
- [MB-280T02: Empower Sellers with Dynamics 365 Sales Training](#)
- [MB-280T04: Configure a Dynamics 365 Customer Experience Solution Training](#)

### **Who should attend this course?**

- Given below are professionals who can use Design and Deliver Powerful Customer Experience with Dynamics 365 Customer Insights Training to upskill their current positions:
  - Business Analysts
  - Sales Professionals
  - CRM Administrators
  - Digital Transformation Leaders
  - Customer Experience Specialists
  - IT Professionals
  - E-commerce Strategist
  - Engagement Managers
  - Customer Service Representatives

### **What you will learn**

- Working with real-time features in Dynamics 365 Customer Insights- Journeys
- Understanding customer intent with Dynamics 365 Customer Insights-Data

### **Prerequisites**

- Basic understanding of customer relationship management (CRM) concepts.
- Basic understanding of Microsoft Dynamics 365 applications and their functionalities.
- Familiarity with data management practices, that include data source and data modelling concepts.
- Basic introductory knowledge about analytics and reporting tools.

### **Curriculum**

#### **Module 1: Work with real-time features in Dynamics 365 Customer Insights - Journeys**

- Create emails in Dynamics 365 Customer Insights - Journeys
  - Upload images to the file library and use images in marketing content.
  - Create and publish an email.
  - Enhance your emails by using personalization, content blocks, content ideas, and more.
  - Upload images to the file library and use images in marketing content.
  - Add personalization to emails.

- Create text messages and push notifications in Dynamics 365 Customer Insights - Journeys
  - Create and publish a text message.
  - Create and publish a push notification.
- Create forms in Dynamics 365 Customer Insights - Journeys
  - Create a form.
  - Edit a form.
  - Publish a form.
- Manage consent in Dynamics 365 Customer Insights - Journeys
  - Manage consent for email and text messages.
  - View and manage consent records.
- Build journeys with Dynamics 365 Customer Insights - Journeys
  - Manage segments in real-time journeys.
  - Work with triggers in real-time journeys.
  - Create a journey.
  - Set a business goal and measure progress through a journey.
  - Determine when to use attribute versus if/then branches.
  - Use an A/B test within the customer journey.
  - Use AI-driven, run-time channel optimization.
  - Raise triggers from a journey to run another journey or Power Automate flow.
- Manage leads and scoring in Customer Insights - Journeys
  - Generate leads.
  - Create sales activities from lead signals.
  - Create scoring models.
- Extend real-time marketing capabilities within Dynamics 365 Customer Insights - Journeys
  - Create custom triggers.
  - Trigger an action outside a journey.
  - Move custom triggers across environments.

## **Module 2: Unlock customer intent with Dynamics 365 Customer Insights - Data**

- Get started with Dynamics 365 Customer Insights - Data
  - Explore Customer Data Platform and learn why it matters to organizations.
  - Get started working with Dynamics 365 Customer Insights - Data, including accessing the application and navigating to the different capabilities.
  - Learn about the Customer Insights - Data capability and how to get started working with it.
- Ingest data into Customer Insights - Data
  - Ingest data using Power Query.
  - Connect to an Azure Data Lake.
  - Connect to a Microsoft Dataverse.
  - Work with data sets.
  - Learn about data refreshes.
  - Export data.
- Create a unified customer profile in Dynamics 365 Customer Insights - Data
  - Learn how to create a Customer Insights - Data instance.
  - Learn how to ingest data.
  - Learn about data unification.
- Work with Dynamics 365 Customer Insights - Data
  - Configure searching and filtering indexes.
  - Define relationships and activities.
  - Work with measures.
  - Use Customer Insights - Data.

- Enrich data and predictions with Customer Insights - Data
  - Discover the enrichment and prediction options that are available in Customer Insights - Data.
  - Configure brand and interest functions.
  - Enrich data with partner services.
  - Set up and configure a customer churn prediction model.
  - Add custom machine-learning models.
- Manage external connections with Customer Insights - Data
  - Export Customer Insights data.
  - Display customer data in Microsoft Dynamics 365 applications.
  - Use Customer Insights - Data with Microsoft Power Platform.
  - Use Customer Insights - Data with Microsoft Azure Synapse Analytics.
  - Use Customer Insights - Data APIs.
- Configure and administer Customer Insights - Data
  - Create, delete, or modify the environments in your Microsoft Dynamics 365 Customer Insights -  
Data instance.
  - Manage tasks and processes.
  - Manage data refresh schedules.
  - Define security permissions.

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*For any query Contact Us – Microtek Learning*

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