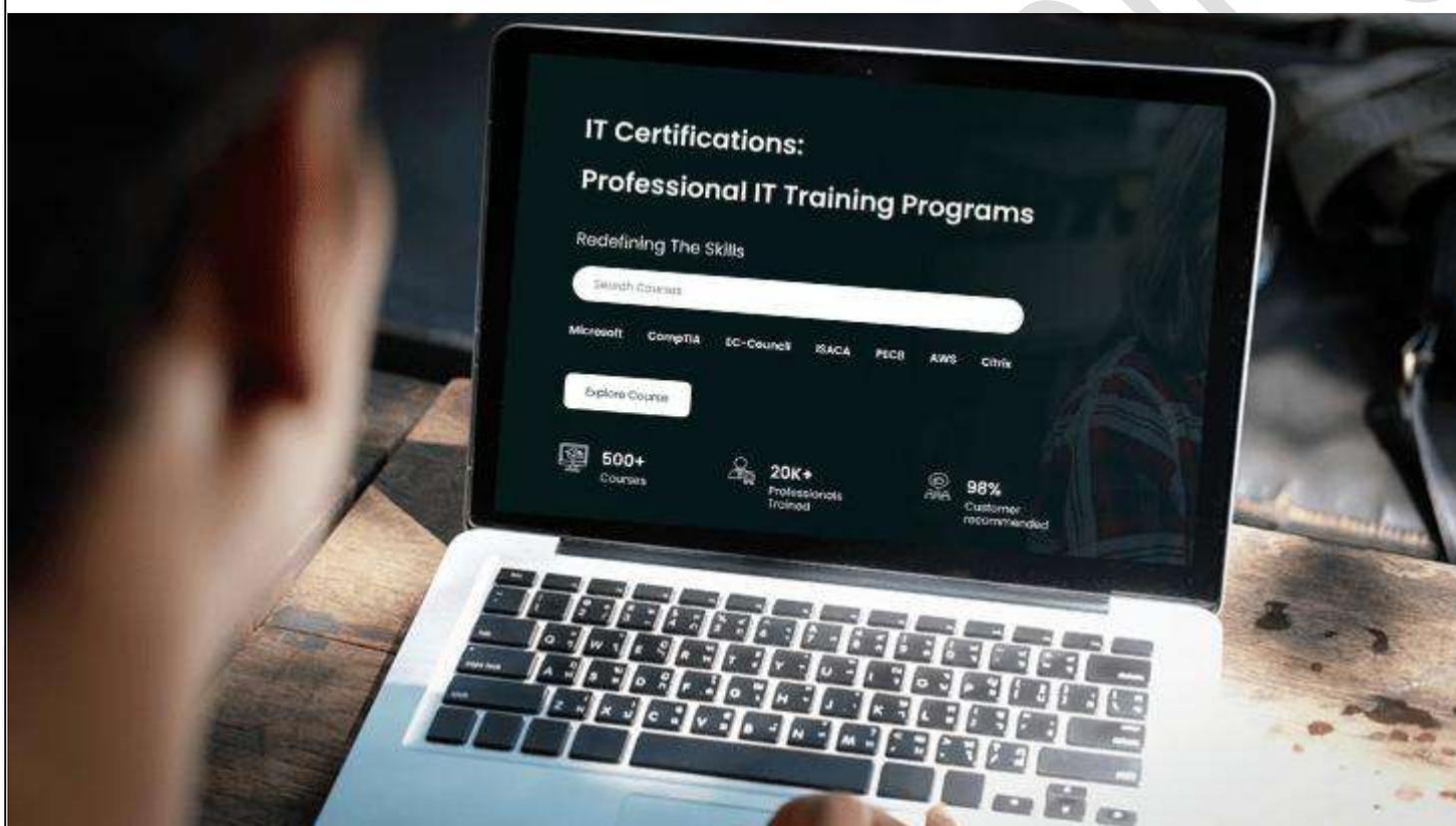# MB-280T04: CONFIGURE A DYNAMICS 365 CUSTOMER EXPERIENCE SOLUTION TRAINING

Duration: 1 Day

Course Description

MB 280T04: Configure a Dynamics 365 Customer Experience Solution Training is for professionals looking to enhance their understanding of customer interactions and sales efficiency by using Dynamics 365.

By completing this training learners will be ready to implement their understanding in the practical world that would impact customer experiences.

This training is a part of a four-course series (MB-280T01-T04), and thus 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 280T03: Design and Deliver Powerful Customer Experience with Dynamics 365 Customer Insights Training

Who should attend this course?

- Given below are professionals who can use Configure a Dynamics 365 Customer Experience Solution Training to upskill their current positions:
    - Business Analysts
    - Customer Relationship Managers
    - Project Managers overseeing CRM initiatives
    - Technical Support Specialist
    - Enterprise Application Managers
    - Customer Service Roles
    - CRM Solution Architects
    - Aspiring Dynamics 365 Developers

What you will learn

- Managing leads with Dynamics 365 Sales
- Building journeys with Dynamics 365 Customer Insights – Journeys
- Configuring a Dynamics 365 Customer Experience Solution
- Managing and Organizing your product catalogue with Dynamics 365 Sales
- Managing opportunities with Dynamics 365 Sales

Prerequisites

- Basic understanding of Microsoft Dynamics 365 applications and their functionalities
- Basic knowledge of data management principles and tools
- Experience with Microsoft Excel and general proficiency in using Microsoft Office applications
- Basic familiarity with the concepts of customer relationship management (CRM) and customer experience management.

Curriculum

Module 1: Manage leads with Dynamics 365 Sales

- Examine the lead qualification process in Dynamics 365 from beginning to end
- Identify the different options that are available for creating and defining leads

- Use business process flows to manage the lead lifecycle
- Qualify and disqualify leads
- Lab: Work with Dynamics 365 leads

Module 2: Manage opportunities with Dynamics 365 Sales

- Identify scenarios where opportunities can be used.
- Create and define opportunities.
- Work with related opportunity records
- Manage an opportunity throughout its lifecycle.
- Lab: Manage opportunities in Dynamics 365

Module 3: Manage and organize your product catalog with Dynamics 365 Sales

- Set up unit groups to help control how products are sold
- Create product family hierarchies that include product bundles and individual products
- Set up product pricing data by creating price lists and price list items
- Use discount lists to provide volume discount pricing
- Lab: Set up the product catalog

Module 4: 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.

Module 5: 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.

Module 6: Challenge project - Configure a Dynamics 365 customer experience solution

- Evaluate requirements.
- Perform gap analysis of existing assets.
- Create needed assets from the stated requirements.
- Use Dynamics 365 Sales and Dynamics 365 Customer Insights to create a customer solution.
- Lab: Customize the sales process
- Lab: Configure the product catalog
- Lab: Design a campaign

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