

Microsoft Certified: Customer Data Platform Specialty – Skills Measured

NOTE: The bullets that follow each of the skills measured are intended to illustrate how we are assessing that skill. This list is NOT definitive or exhaustive.

NOTE: Most questions cover features that are general availability (GA). The exam may contain questions on Preview features if those features are commonly used.

Exam MB-260: Microsoft Customer Data Platform Specialist

Design Customer Insights solutions (5-10%)

Describe Customer Insights

- describe audience insights components, including entities, relationships, activities, measures, and segments
- analyze Customer Insights data by using Azure Synapse Analytics
- describe the process for consuming engagement insights data in audience insights
- describe support for near real-time updates
- describe support for enrichment

Describe use cases for Customer Insights

- describe use cases for audience insights
- differentiate between audience insights and engagement insights
- describe use cases for creating reports by using Customer Insights
- describe use cases for extending Customer Insights by using Microsoft Power Platform components
- describe use cases for Customer Insights APIs

Ingest data into Customer Insights (10-15%)

Connect to data sources

- determine which data sources to use
- determine whether to use the managed data lake or an organization's data lake
- connect to Microsoft Dataverse
- connect to Common Data Model folders
- ingest data from Azure Synapse Analytics

- ingest data by using Azure Data Factory pipelines

Transform, cleanse, and load data by using Power Query

- select tables and columns
- resolve data inconsistencies, unexpected or null values, and data quality issues
- evaluate and transform column data types
- apply data shape transformations to tables

Configure incremental refreshes for data sources

- identify data sources that support incremental updates
- identify capabilities and limitations for scheduled refreshes
- configure scheduled refreshes and on-demand refreshes
- trigger refreshes by using Power Automate or the Customer Insights API

Create customer profiles by unifying data (20-25%)

Implement mapping

- select Customer Insights entities and attributes for matching
- select attribute types

Implement matching

- specify a match order for entities
- define match rules
- configure normalization options
- differentiate between low, medium, high, exact, and custom precision methods
- configure deduplication
- run a match process and review results

Implement merges

- specify the order of fields for merged tables
- combine fields into a merged field
- separate fields from a merged field
- exclude fields from a merge
- run a merge and review results

Configure search and filter indexes

- define which fields should be searchable

- define filter options for fields
- define indexes

Configure relationships and activities

- create and manage relationships
- create activities by using a new or existing relationship
- manage activities

Implement AI predictions in Customer Insights (10-15%)

Configure prediction models

- configure and evaluate the customer churn models, including the transactional churn and subscription churn models
- configure and evaluate the product recommendation model
- configure and evaluate the customer lifetime value model

Impute missing values by using predictions

- describe processes for predicting missing values
- implement the missing values feature

Implement machine learning models

- describe prerequisites for using custom Azure Machine Learning models in Customer Insights
- implement workflows that consume machine learning models
- manage workflows for custom machine learning models

Configure measures and segments (15-20%)

Create and manage measures

- describe the different types of measures
- create a measure
- create a measure by using a template
- configure measure calculations
- modify dimensions

Create segments

- describe methods for creating segments, including blank segments

- create a segment from customer profiles, measures, or AI predictions
- find similar customers

Find suggested segments

- describe how the system suggests segments for use
- create a segment from a suggestion
- configure refreshes for suggestions

Create segment insights

- configure overlap segments
- configure differentiated segments
- analyze insights

Configure third-party connections (10-15%)

Configure connections and exports

- configure a connection for exporting data
- create a data export
- schedule a data export

Export data to Dynamics 365 Marketing or Dynamics 365 Sales

- identify prerequisites for exporting data from Customer Insights
- create connections between Customer Insights and Dynamics 365 apps
- define which segments to export
- export a Customer Insights segment into Dynamics 365 Marketing as a marketing segment
- export a Customer Insights profile into Dynamics 365 Marketing for customer journey orchestration
- export a Customer Insights segment into Dynamics 365 Sales as a marketing list

Display Customer Insights data from within Dynamics 365 apps

- identify Customer Insights data that can be displayed within Dynamics 365 apps
- configure the Customer Card Add-in for Dynamics 365 apps
- identify permissions required to implement the Customer Card Add-in for Dynamics 365 apps

Administer Customer Insights (5-10%)

Create and configure environments

- identify who can create environments
- differentiate trial and production environments
- manage existing environments
- describe available roles
- configure user permissions and guest user permissions

Manage system refreshes

- differentiate between system refreshes and data source refreshes
- describe refresh policies
- configure a system refresh schedule
- monitor and troubleshoot refreshes