

KOENIG SOLUTIONS • COURSE OUTLINE

MB-260T00: Microsoft Customer Insights - Data Specialty

4 Days

32 HOURS

7

MODULES

87

TOPICS

COURSE OVERVIEW

The MB-260T00: Microsoft Customer Insights - Data Specialty course is designed to equip learners with the expertise to implement and manage the Microsoft Customer Insights solution. This course offers a comprehensive dive into the capabilities of Dynamics 365 Customer Insights, a customer data platform that enables organizations to unify and understand their customer data to create rich, personalized experiences. Through various modules, participants learn to design solutions, ingest and unify data to create customer profiles, work with AI predictions, configure measures and segments, manage external connections, and administer the platform. The course elucidates use cases, Data ingestion, Data transformation, AI model configuration, Segment creation, and Data enrichment. By completing the course, learners will be adept at leveraging Dynamics 365 Customer Insights to gain a 360-degree view of customers, which is essential for making informed business decisions and enhancing customer engagement. The hands-on labs provided ensure that participants not only understand the theoretical aspects but also gain practical experience in working with the platform, thus preparing them for real-world applications and the MB-260 certification exam.

WHO THIS COURSE IS FOR

The MB-260T00 course focuses on mastering Microsoft Customer Insights for data-driven decision-making in customer relations.

Data Analysts

Customer Relationship Managers

Marketing Professionals

Business Intelligence Specialists

IT Professionals involved in CRM solutions

Dynamics 365 Administrators

Sales Analysts

Customer Insights Managers

CRM Consultants

Data Scientists focused on Customer Analytics

Marketing Technologists

Digital Transformation Specialists

What You Will Learn

- Describe Customer Insights components and audience insights use cases
- Connect to data sources and ingest data using Azure Synapse or Data Factory
- Transform and cleanse data with Power Query and configure incremental refreshes
- Implement mapping, matching, and merging to build unified customer profiles
- Configure search indexes, relationships, and activities for entities
- Configure AI models for churn, recommendations, and lifetime value
- Create measures and segments and identify suggested segments
- Configure third-party connections and export data to Dynamics 365 apps

COURSE SYLLABUS

7 Modules, 87 Topics

01

5-10%

Customer Insights Solutions

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

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

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

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

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

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

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

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

FLEXIBLE DELIVERY

Learn the Way That Suits You

Classroom Training

Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

Flexi (Self-Paced)

1-on-1 Training

Ready to Get Started?

Talk to a learning advisor about schedules, group training and customised delivery.

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