

MB-260T00: Microsoft Customer Insights - Data Specialty

Course Duration: 32 Hours

Course code: MB-260T00

1. Course Overview

The MB-260T00: Microsoft Customer Insights – Data Specialty course enables professionals to implement Dynamics 365 Customer Insights – Data solutions to unify and enrich customer profiles, enhance engagement, and improve customer experiences. This training covers importing and transforming customer data, leveraging AI-powered segmentation and predictions, and integrating the insights platform with Power Platform and Dynamics 365 applications

2. What you'll learn?

By the end of this course, you will be able to:

- Understand the business value and core capabilities of a Customer Data Platform and the Dynamics 365 Customer Insights – Data environment.
- Ingest, clean, transform, and load customer data from various sources using Power Query, Azure Data Lake, Microsoft Dataverse, and the Common Data Model.
- Build unified customer profiles by defining mappings, matching rules, duplicate detection, and merging strategies.
- Work with measures, activities, relationships, segments, and use suggested segments and insights for targeted strategies.
- Enrich data using brand and interest enrichment services, apply AI/ML models, and create predictive models like customer churn analysis.
- Manage integrations and export capability: surface insights in Dynamics 365, Power Platform, Azure Synapse, and via Customer Insights APIs.
- Administer Customer Insights environments: set up environments, manage refreshes, permissions, and system processes.

3. Target Audience

This course is ideal for:

- Data Analysts, Data Scientists, BI Specialists wanting to leverage AI and analytics for customer data insights.
- CRM Consultants, Dynamics 365 Administrators, Customer Insights Managers aiming to enhance customer understanding through advanced platforms.
- Marketing Professionals seeking deeper customer segmentation and predictive modeling capabilities.
- Power Platform Developers, IT/Compliance Officers, Privacy & Governance Specialists involved in managing customer data, security, consent, and compliance.

4. Pre-Requisites

Learners should have:

- Familiarity with Dynamics 365 Customer Insights – Data, at least one other Dynamics 365 app, Power Query, Microsoft Dataverse, and the Common Data Model.
- Understanding of Microsoft Power Platform, data ingestion, transformation, mapping, matching, merging, and building unified profiles.
- Awareness of privacy, compliance, consent, security, responsible AI, and data retention policies.
- Optional but recommended: familiarity with Power Query for data cleansing, Azure Synapse, Azure ML, Azure Data Lake, and basic ML/AI concepts.

5. Course content

Module 1: Get started with Dynamics 365 Customer Insights – Data

- Business value of Customer Data Platforms
- Accessing and navigating the Customer Insights interface
- Administering the environment and managing user permissions

Module 2: Ingest data into Customer Insights – Data

- Import and transform data using Power Query
- Connect to Azure Data Lake, Microsoft Dataverse, and Common Data Model
- Work with datasets and manage data refresh cycles

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

- Define source columns, duplicate detection settings, matching rules
- Merge data into unified customer profiles

Module 4: Work with Dynamics 365 Customer Insights – Data

- Configure search and filter indexes
- Define relationships and activities in customer data
- Work with measures, build segments, and use suggested segment insights

Module 5: Enrich data and predictions with Audience insights

- Apply enrichment services (brand, interests)
- Use predictive analytics and ML models (e.g., churn prediction)

Module 6: Manage external connections with Customer Insights – Data

- Export data to Dynamics 365 apps and Power Platform
- Integrate with Azure Synapse and use Customer Insights APIs

Module 7: Configure and administer Customer Insights – Data

- Create and configure environments
- Monitor system process status, schedule refreshes
- Manage user access and permissions

