

MB-280T04: Configure a Dynamics 365 customer experience solution

Course Duration: 8 Hours

Course code: MB-280T04

1. Course Overview

The MB-280T04: Configure a Dynamics 365 Customer Experience Solution course is designed to provide learners with the skills needed to configure, customize, and implement customer experience solutions using Dynamics 365 Customer Insights. This training covers the configuration of data sources, customer profiles, measures, segments, activities, and customer journeys, enabling organizations to deliver personalized and efficient customer experiences. Participants will gain hands-on experience with real-world scenarios, ensuring they are ready to apply their skills effectively in business environments.

2. What you'll learn?

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

- Configure data sources and unify customer data in Dynamics 365 Customer Insights.
- Create and manage customer profiles, measures, and segments.
- Set up activities, customer journeys, and experiences.
- Integrate Dynamics 365 with other Microsoft applications and external tools.
- Apply personalization to improve customer engagement and satisfaction.
- Implement governance and compliance settings for customer data management.

3. Target Audience

This course is ideal for:

- Functional consultants and solution architects working with Dynamics 365.
- CRM administrators and business analysts involved in customer experience design.
- IT professionals responsible for configuring and deploying Dynamics 365 Customer Insights.
- Professionals seeking to improve organizational customer engagement strategies.

4. Pre-Requisites

Learners should have:

- A basic understanding of Dynamics 365 Customer Insights and CRM concepts.
- Knowledge of data management principles and customer engagement processes.
- Experience working with Microsoft Power Platform is beneficial but not mandatory.

5. Course content

Module 1: Configure Data Sources and Unify Data

- Connect and manage data sources.
- Map and match data to unify customer profiles.

Module 2: Create and Manage Customer Profiles

- Understand customer profile structures.
- Manage and maintain profile data.

Module 3: Define and Use Measures

- Create and configure measures.

- Analyze customer behavior using measures.

Module 4: Create and Manage Segments

- Build dynamic and static segments.
- Use segmentation for targeted engagement.

Module 5: Configure Activities and Journeys

- Set up customer journeys.
- Automate engagement processes.

Module 6: Personalization and Insights

- Configure personalization tokens and rules.
- Use AI-driven insights for better decision-making.

Module 7: Integration and Extensibility

- Integrate with Microsoft Power Platform and other systems.
- Extend solution capabilities through APIs and connectors.

Module 8: Governance and Compliance

- Configure data retention and security policies.
- Ensure compliance with industry regulations.