

MB-7006: Create and manage segments in Customer Insights – Data Course

Course Duration: 8 Hours

Course code: MB-7006

1. Course Overview

The MB-7006: Create and Manage Segments in Customer Insights – Data course provides a comprehensive understanding of how to create, configure, and manage customer segments using Microsoft Dynamics 365 Customer Insights – Data. Participants will learn how to segment customers based on specific criteria, use insights to personalize interactions, and leverage segmentation for marketing and customer engagement strategies. Through hands-on exercises and guided instruction, learners will gain the skills to efficiently manage and optimize customer segments for improved business outcomes.

2. What you'll learn?

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

- Understand the purpose and benefits of customer segmentation in Dynamics 365 Customer Insights – Data.
- Create dynamic and static segments based on business requirements.
- Apply filters and conditions to refine target customer groups.
- Manage and update segments for accurate audience targeting.
- Integrate segments with marketing campaigns and other Dynamics 365 applications.
- Monitor segment performance and optimize for better results.

3. Target Audience

This course is ideal for:

- Customer Data Analysts
- CRM Administrators
- Marketing Specialists
- Business Intelligence Professionals
- Dynamics 365 Consultants
- Professionals involved in customer engagement and personalization strategies

4. Pre-Requisites

Learners should have:

- Basic understanding of customer data and CRM concepts.
- Familiarity with Dynamics 365 Customer Insights – Data interface.
- Knowledge of customer engagement or marketing strategies is beneficial but not mandatory.

5. Course content

Module 1: Introduction to Customer Segmentation

- Understanding segmentation concepts
- Business benefits of effective segmentation
- Overview of segmentation capabilities in Customer Insights – Data

Module 2: Creating Segments

- Difference between dynamic and static segments
- Defining segment criteria
- Creating segments using filters and conditions

Module 3: Managing and Refining Segments

- Updating segment definitions

- Merging and deleting segments
- Best practices for segment accuracy

Module 4: Using Segments for Marketing and Engagement

- Connecting segments to marketing campaigns
- Leveraging segments for personalized customer experiences
- Integrating segments with other Dynamics 365 modules

Module 5: Monitoring and Optimizing Segments

- Tracking segment performance
- Analyzing customer behavior within segments
- Optimizing segments for better targeting

Module 6: Hands-On Exercises and Case Studies

- Practical exercises in creating and managing segments
- Real-world scenarios and solutions