Create and manage segments in Dynamics 365 Customer Insights - Data (MB-7006)

ID MB-7006   **Price** on request   **Duration** 1 day

Prerequisites

You should be familiar with the basic features of Dynamics 365 Customer Insights - Data and basic data modeling principles.

Course Content

Ingest data into Customer Insights - Data

Customer Insights - Data ingests data from all your different data sources and unifies them into a single customer profile. From within the customer profile, you can track data across different demographics, and identify trends based on key data you want to track.

- Introduction
- Import data sources using Power Query
- Clean, transform, and load data
- Connect to an Azure Data Lake
- Connect to a Microsoft Dataverse
- Work with data sets
- Refresh data sources
- Check your knowledge
- Summary

Create a unified customer profile in Dynamics 365 Customer Insights - Data

Dynamics 365 Customer Insights - Data is an intuitive and flexible customer data platform (CDP) that helps you unlock insights and build a deeper understanding of your customers. In this module, you'll learn about creating a unified customer profile in Customer Insights - Data.

- Introduction
- Define source columns
- Define duplicate record settings
- Define matching rules
- Create a unified customer profile
- Check your knowledge
- Summary

Work with Dynamics 365 Customer Insights - Data

Customer Insights - Data ingests data from all of your different data sources and unifies them into a single customer profile. In this module, learn about working with Customer Insights - Data.

- Introduction
- Configure searching and filtering indexes
- Define activities
- Work with measures
- Segmentation
- Get suggested segments
- Segment insights
- Use Customer Insights - Data for a complete solution
- Check your knowledge
- Summary

Guided project - Create and manage segments with Dynamics 365 Customer Insights - Data

In this module, practice building segments in Dynamics 365 Customer Insights - Data, including creating segments from profiles, creating segments with multiple rules, generating segment insights, and managing segments.

- Introduction
- Prepare for the guided project
- Exercise - Create unified customer profiles
- Exercise - Create measures
- Exercise - Create segments
- Exercise - Generate segment insights
- Knowledge check
- Summary

Training Centres worldwide
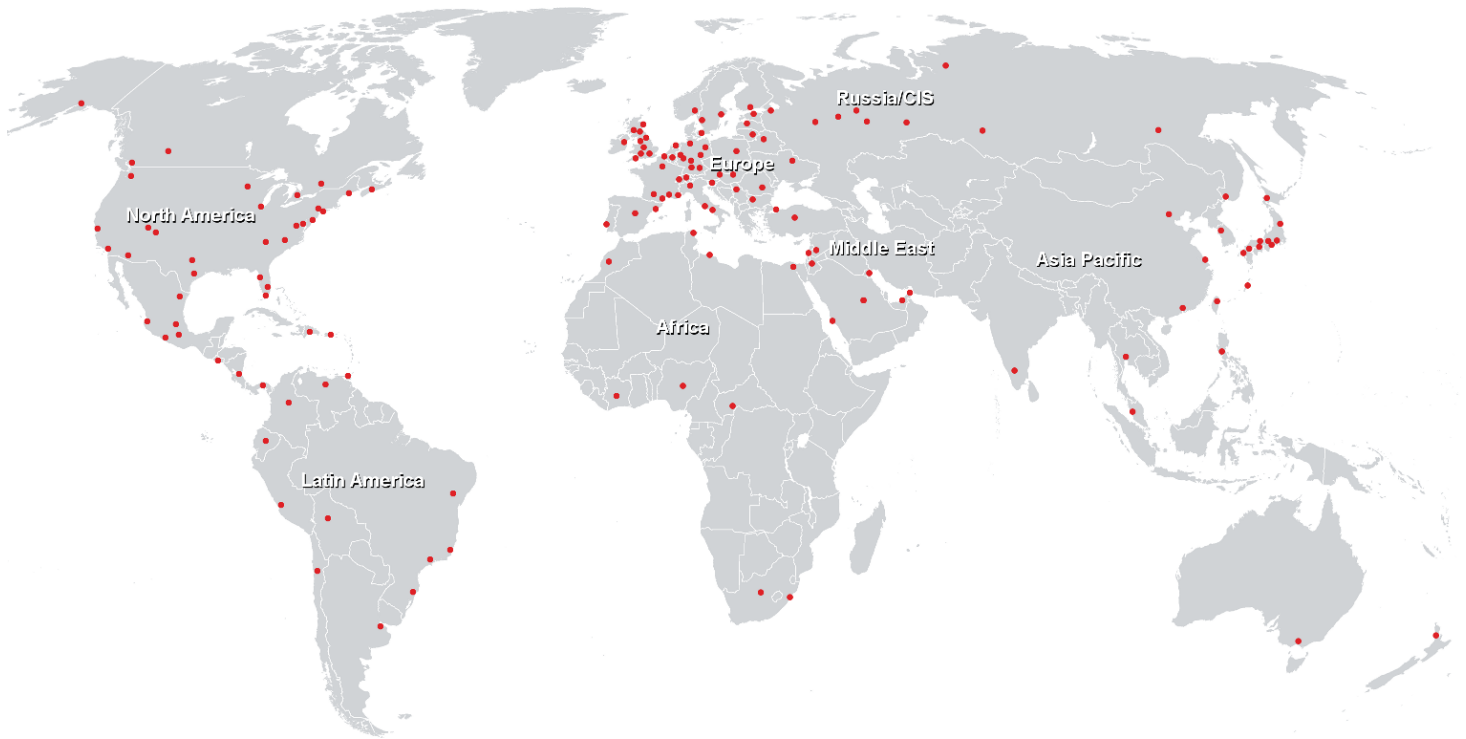
Fast Lane Institute for Knowledge Transfer (Switzerland) AG

Husacherstrasse 3
CH-8304 Wallisellen
Tel. +41 44 832 50 80

info@flane.ch, https://www.flane.ch