

Microsoft Dynamics 365 Customer Insights data Specialist



Online Course

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Course Modules

1. Configure the Customer Insights - Journeys app

- Forms, including add columns to forms & change form layouts
- Configure views, including adding columns to views
- Configure the model-driven app
- Create and configure columns in tables



2. Configure organization settings

- Configure domain authentication
- SMS providers, including MS Azure Communication Services

3. Configure and manage marketing settings

- Configure form matching strategies
- Configure compliance profiles
- Configure brand profiles
- Configure UTM tracking
- Configure audiences
- Configure frequency capping

4. Create and manage segments

- Create and manage segments
- Create segments by using Copilot Query Assist
- Combine segments by using union, exclude, or intersect logic
- Create a segment within a customer journey

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5. Manage preference centers

- Create and manage preference centers
- Consent is managed and enforced for email and text messages
- Configure opt-in and double opt-in
- Describe consent purposes and topics
- Import consent records
- Describe multi-brand preference centers



6. Manage leads

- Create leads
- Manage the leads lifecycle
- Create and manage lead scoring models

7. Create and manage accounts and contacts

- Create and manage accounts
- Create and manage contacts
- Create and manage activities and activity templates

8. Distribute marketing emails

- Define message requirements
- Validate and publish email messages
- Send emails without building a journey
- Prevent duplicate sends



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9. Create marketing emails

- Create a marketing email
- Describe the HTML editor feature in a marketing email
- Create and use reusable content blocks
- Define mandatory fields for email
- Add dynamic content to email
- Add conditional content to email
- Validate email content for compliance
- Check spam scores for email content by using Spam checker
- Personalize email content
- Describe the content ideas copilot
- Use specialized links
- Include iCalendar files and documents from the asset library



10. Create and manage other channels

- Create outbound text messages
- Add SMS keywords to a text message
- Personalize text messages
- Manage SMS keywords
- Configure push notifications
- Include Customer Voice surveys in messages

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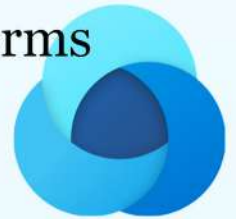
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11. Create and manage forms

- Manage form templates
- Create and manage forms
- Embed forms in external websites
- Implement form capture for externally managed forms
- Review form submissions
- Describe form hosting options
- Describe use cases for extending forms by using JavaScript
- Configure form validation rules



12. Configure journey orchestration

- Create a journey by using a segment
- Configure a journey by using a trigger
- Configure A/B testing and review test results
- Configure a business goal and measure progress
- Add journey reminders
- Define journey exit conditions
- Add channel optimization to a journey

13. Explore insights and analytics

- Analyze marketing outcomes
- Track campaigns by using UTM codes

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14. Manage journey triggers

- Describe trigger types
- Describe custom triggers
- Create a trigger for a Dataverse record change
- Use a custom trigger to run a Power Automate flow
- Use conditions in triggers
- Move custom triggers between environments



15. Create and configure events and webinars

- Create an event
- Configure an event as a Microsoft Teams webinar
- Configure an event as a Microsoft Teams Live event
- Configure event agenda, including sessions and tracks
- Manage speakers and event team members
- Create and manage event forms

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16. Manage events

- Event reg, including attendee check-in and cancellations
- Manage registration, waitlists, and attendees
- Configure event capacity and passes
- Event management dashboard and event analytics



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