MS-MB280T04: CONFIGURE A DYNAMICS 365 CUSTOMER EXPERIENCE SOLUTION

DURATION	LEVEL	TECHNOLOGY	DELIVERY METHOD	TRAINING CREDITS
1 Day	Intermediate	Dynamics 365	Instructor-led	NA

INTRODUCTION

This learning path prepares you to complete the Dynamics 365 customer experience analyst challenge project and validate your skills. You should have already completed the following modules as part of the MB-280: Dynamics 365 Customer Experience Analyst course series. If you haven't, it's recommended that you take some time to complete these modules before beginning the challenge project.

AUDIENCE PROFILE

This course is designed for IT, sales, or marketing professionals. The ideal candidates are those who want to leverage Dynamics 365 Sales and Dynamics 365 Customer Insights to create a comprehensive customer experience solution.

PREREQUISITES

Before attending this course:
- You should be familiar with the basic features of Dynamics 365 Sales and Dynamics 365 Customer Insights and how to configure them.

COURSE OBJECTIVES

This course aims to equip participants with the skills to configure Dynamics 365 Sales and Dynamics 365 Customer Insights model-driven apps to create a comprehensive customer experience solution. Here are the key course objectives:
- Manage leads and opportunities with Dynamics 365 Sales.
- Organize your product catalog using Dynamics 365 Sales.
- Create and manage journeys with Dynamics 365 Customer Insights.
- Build a customer experience solution** by configuring Dynamics 365 Sales and Customer Insights.
- Apply real-world challenges to configure Dynamics 365 Sales and Customer Insights model-driven apps.

COURSE CONTENT

Module 1: Manage leads with Dynamics 365 Sales
The lead management capabilities in Microsoft Dynamics 365 let you connect with your customers in a whole new way. This module provides an overview of what leads are, and describes the different options for creating leads, managing them, and working with them throughout their lifecycle. It also provides information about qualifying and disqualifying leads. The more leads you have, the greater your chances of getting opportunities and successfully closing deals.
Lessons
- Dynamics 365 leads overview
- Create Dynamics 365 leads
- Lead management lifecycle
- Lead qualification
- Use Copilot with leads

- Lab - Work with Dynamics 365 leads
- Lead data management tools
- Check your knowledge
- Summary

By the end of this module, you will be able to:
- Examine the lead qualification process in Dynamics 365 from beginning to end
- Identify the different options that are available for creating and defining leads
- Use business process flows to manage the lead lifecycle
- Qualify and disqualify leads

Module 2: Manage opportunities with Dynamics 365 Sales
The opportunity management capabilities in Microsoft Dynamics 365 make it easy to manage opportunities and convert more leads. In this module, you'll learn how and when opportunities are used and managed in Dynamics 365. You'll also learn about the options for creating opportunities, their relationships with other records, and how to manage them throughout their lifecycle. By providing a complete view of the customer, Dynamics 365 helps you win more deals.
Lessons
- Dynamics 365 opportunity overview
- Create Dynamics 365 opportunities
- Account and team selling
- Opportunity management lifecycle
- Use Copilot with opportunities
- Lab - Manage opportunities in Dynamics 365
- Check your knowledge
- Summary

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

- Identify scenarios where opportunities can be used.
- Create and define opportunities.
- Work with related opportunity records
- Manage an opportunity throughout its lifecycle.

Module 3: Manage and organize your product catalog with Dynamics 365 Sales

Microsoft Dynamics 365 helps organize and manage even the most complex product catalog to support your customers in customer engagement scenarios (for example, sales and column service). In this module, you learn how to define products, families, and bundles, take advantage of product properties, and define price lists. You also learn about pricing options for increased consistency and efficiency.

Lessons

- Dynamics 365 product catalog overview
- Currencies and currency management
- Define products
- Product families
- Price lists
- Product catalog settings
- Exercise - Set up the product catalog
- Check your knowledge
- Summary

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

- Set up unit groups to help control how products are sold
- Create product family hierarchies that include product bundles and individual products
- Set up product pricing data by creating price lists and price list items
- Use discount lists to provide volume discount pricing

Module 4: Create emails in Dynamics 365 Customer Insights - Journeys

This module covers emails, assets, and personalization in the real-time

work area of Dynamics 365 Customer Insights - Journeys.

Lessons

- Introduction
- Manage assets
- Create marketing emails
- Personalize content
- Use brand profiles
- Use Copilot to generate email content ideas
- Style emails with AI-assisted themes
- Create content blocks
- Preview and test emails
- Check your message for errors and publish
- Send emails without building a journey
- Edit a live email
- Prevent sending emails to duplicated email addresses
- Check your knowledge
- Summary

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

- Upload images to the file library and use images in marketing content.
- Create and publish an email.
- Enhance your emails by using personalization, content blocks, content ideas, and more.
- Upload images to the file library and use images in marketing content.
- Add personalization to emails.

Module 5: Build journeys with Dynamics 365 Customer Insights - Journeys

This module covers segments, triggers, and journeys within the real-time work area of Dynamics 365 Customer Insights - Journeys.

Lessons

- Introduction
- Create and manage segments
- Work with triggers
- Create a journey
- Add messages to the journey
- Add activities to the journey
- Add other elements to the journey
- Publish journeys
- Check your knowledge
- Summary

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

- Manage segments in real-time journeys.
- Work with triggers in real-time journeys.
- Create a journey.
- Set a business goal and measure progress through a journey.
- Determine when to use attribute versus if/then branches.
- Use an A/B test within the customer journey.
- Use AI-driven, run-time channel optimization.
- Raise triggers from a journey to run another journey or Power Automate flow.

Module 6: Challenge project - Configure a Dynamics 365 customer experience solution

In this challenge project, configure your own customer experience solution. You'll be provided with high-level specifications of a fictional company's requirements. The solution will include Dynamics 365 Sales and Dynamics 365 Customer Insights.

Lessons

- Introduction
- Get to know your customer experience scenario
- Exercise - Customize the sales process
- Exercise - Configure the product catalog
- Exercise - Design a campaign
- Knowledge check
- Summary

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

- Evaluate requirements.
- Perform gap analysis of existing assets.
- Create needed assets from the stated requirements.
- Use Dynamics 365 Sales and Dynamics 365 Customer Insights to create a customer solution.
- Learn how to create a Customer Insights - Data instance.
- Learn how to ingest data.
- Learn about data unification.

ASSOCIATED CERTIFICATIONS & EXAM

This course will prepare delegates to write the Microsoft MB-280: Microsoft Certified: Dynamics 365 Customer Experience Analyst Associate exam.