

# Activate - Dynamics 365 Customer Insights - Journeys Outbound to Real-Time Transition



## Proof of Concept

**Duration:** 1 - 3 Days [ Remote | Onsite ]

**Difficulty Level:** 300 - Advanced

### Description

This engagement is designed to help organizations streamline their customer engagement by transitioning from outbound to real-time customer journey insights. This service focuses on leveraging Dynamics 365 Customer Insights to analyze and act upon data in real time. Participants will learn how to integrate and utilize powerful analytics to create more dynamic and responsive interactions, ultimately enhancing customer satisfaction and loyalty. The session includes hands-on exercises to apply learned concepts, ensuring participants can implement these strategies effectively in their own business environments.

### Objectives

- Understand customer insights.
- Configure journeys outbound.
- Transition to real-time.
- Validate data integration.
- Explore analytics features.
- Assess system performance.

### Outcomes

- Seamless integration setup.
- Real-time data processing.
- Enhanced customer journey mapping.
- Improved outbound communication strategies.
- Immediate insights activation.
- Optimized operational efficiency.

### Methodology

#### Learn by example

Work closely with a Microsoft architect to learn key concepts and best practices to enable a real-world deployment scenario.

#### Hands-on

Work with a Microsoft engineer to build and deploy a Proof of Concept.

### Scope

The scope for this topic involves transitioning from outbound to real-time journeys in Dynamics 365 Customer Insights.

### Agenda

- Introduction to customer insights.
- Outbound journeys overview.
- Real-time transition strategies.
- Data integration techniques.
- Implementation best practices.
- Review and Q&A session.

# Delivery Outline

## Requirements

### Participants

- Dynamics 365 Solution Architect.
- Data Analyst.
- Insights Specialist.
- Marketing Manager.
- IT Systems Integrator.

### Skill Requirements

- Dynamics 365 access.
- Customer Insights enabled.
- Outbound marketing data.
- Basic marketing knowledge.
- Understanding of real-time data processing.

### Time Commitment

- Approximately 30 minutes scoping call.
- One to three full-day engagements with relevant roles.

### Delivery Requirements

- Supported version of Windows.
- Modern browser, such as Microsoft Edge (or equivalent).
- Internet access.
- Microsoft Teams for remote deliveries.

## Activate

- Review the existing outbound journey configurations and data flow.
- Design and map the real-time journey processes.
- Implement a pilot real-time journey based on the identified requirements.
- Test and validate the real-time journey implementation.

***If you are interested in this engagement for your organization, contact your Microsoft Account Representative.***