

WorkshopPLUS - Dynamics 365 Customer Insights - Journeys 1 Day with Labs



WorkshopPLUS

Duration: 1 Day [Remote | Onsite]

Difficulty Level: 200 - Intermediate

Description

Learn how to manage and work in Dynamics 365 Customer Insights Journeys (CIJ). Gain experience through a combination of hands-on exercises combined with expert instruction on tools and techniques. Create segments and journeys to target individuals or leads based on key data points and track their behavior in journeys.

Objectives

- Set up the Customer Insights environment and ingest data.
- Unify data to provide a 360-degree customer view.
- Use Customer Insights to build marketing segments, develop customer profiles, manage relationships, and devise metrics to unleash the potential of customer data.

Outcomes

- Acquire the necessary understanding to facilitate customer insights and begin empowering your business departments to utilize customer data through various experiences.

Methodology

Learn by example

Participate in group discussions and learn from presentations and demonstrations.

Hands-on

- Use a ready environment for a hands-on experience.
- Access resources and labs for up to six months after the workshop.

Scope

- The scope is limited to learning to use Dynamics 365 Customer Insights.

Agenda

Day 1

- Learn how to create and manage customer journeys using Customer Insights Journeys (CIJ).
- Understand the privacy and compliance aspects of CIJ, such as compliance profiles, preference centers, and consent.
- Use the segment and trigger designer to target customers based on attributes and behaviors.
- Create and personalize email campaigns and forms using the CIJ email and form designer.
- Design and implement segment-based and trigger-based journeys with branching capabilities.
- Analyze the insights and metrics of your journeys and segments using CIJ analytics.

Delivery Outline

Requirements

Participants

- Dynamics 365 Customer Insights (Journeys App Users).
- Marketing staff with knowledge of marketing use cases.

Skill Requirements

- Understanding of marketing use cases.

Time Commitment

- One full-day engagement with relevant roles.

Delivery Requirements

- Computer with Windows 10 or later, audio equipment, internet access.
- Modern browser and at least 1 Mbps bandwidth per participant. Microsoft Teams for remote deliveries.

Education

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| Overview | <ul style="list-style-type: none">• Dynamics 365 Customer Insights Journeys Overview and Navigation• Outbound vs Real-time journeys (RTJ) |
| Privacy and Compliance | <ul style="list-style-type: none">• Compliance Profile• Preference Center• Consent for Email and Text Messages |
| Segments & Triggers | <ul style="list-style-type: none">• Segment Designer and Capabilities• Attribute and Behavioral Segments• Review Triggers in CIJ• Segment vs Triggers |
| Email, Personalization & Channels | <ul style="list-style-type: none">• CIJ Emails• Email Designer and Elements• Brand Profiles |
| Forms | <ul style="list-style-type: none">• What are forms• Form Creation Designer and Elements• Target Audience• Extending your Form |
| Journeys and Analytics | <ul style="list-style-type: none">• Review Journey options (Segment/Trigger based)• Review Journey Designer and different implementations• Branching capabilities in Journeys• Create a segment-based journey and a trigger-based journey• Insights and Analytics Capabilities in Dynamics 365 CIJ |

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