

Activate - Dynamics 365 Customer Insights

Proof of Concept

Duration: 1 Day [Onsite/Remote]

Difficulty Level: 300 - Advanced

Description

The updated Customer Insights now includes two distinct experiences your team can use to manage your customer data and then put that data into action. To see how data analysts can use Customer Insights to glean valuable insights and enhance their knowledge of customers, begin with 360-degree view. With our diverse feature set in Customer Insights, you can choose from the following modules, choose one of the following:

- Activate - Dynamics 365 Customer Insights - Journeys Copilot
- Activate - Dynamics 365 Customer Insights - Data Copilot

Objectives

- Determine whether Dynamics 365 Customer Insights is a suitable solution for the organization's customer data management and analysis needs.
- Verify the functionality and features of Dynamics 365 Customer Insights to ensure it aligns with the organization's requirements.

Outcomes

- Confirm whether Dynamics 365 Customer Insights aligns with the organization's needs and requirements for customer data management and analysis.
- Showcase the platform's features and functionalities, demonstrating its capabilities in handling and analyzing customer data.

Methodology

Learn by example

Work closely with a Microsoft resource to learn key concepts and best practices to enable and use the different Customer Insights features

Hands-on

Configure and Enable Dynamics 365 Customer Insights features.

Prerequisites

As a prerequisite, Customer Insights Journey or Data should be already implemented and activated.

Scope

1. The scope is limited to learning to use Dynamics 365 Customer Insights where all applications & environments are present in a single tenant.
2. Delivery will be scoped to one of the below modules (See below for more details).

Delivery Outline

Activate - Dynamics 365 Customer Insights - Journeys Copilot

Description	Learn how to enable and work in Dynamics 365 Customer Insights Journeys (CIJ) Copilot. Gain experience through a combination of demo combined with expert instruction on the Copilot features. Marketers can now take advantage of the latest next-generation AI-powered tools to enhance their marketing effort. With the journey copilot, anyone can now use every day conversational language to create marketing journeys without requiring deep knowledge about the product. You can even improve the copilot by giving feedback, helping you achieve more detailed results in the future.
Duration and Level	<ul style="list-style-type: none"> • 1 Day • Level 300
Detailed Agenda	<ul style="list-style-type: none"> ▪ Enable Dynamics 365 Customer Insights Journeys Copilot ▪ Target the right customers using query assist ▪ Use AI to kickstart email creation ▪ Refresh and perfect your message ▪ Style your emails with AI-assisted themes ▪ Create journeys using AI assistance
Participants	Active Dynamics 365 Customer Insights Journeys users and System Administrators.
Skill Requirements	<ul style="list-style-type: none"> • Knowledge and Experience with Customer Insights Journey Application • Customer Insights environment configured
Delivery Requirements	<ul style="list-style-type: none"> • Computer with Windows 10 or later, audio equipment, internet access and at least 1 Mbps bandwidth per participant • Microsoft Teams for remote deliveries • A modern browser capable of rendering web sites that use current web standards • Completion of trial environment set up with Sales Insights premium provisioned as explained in set up document prior to Workshop • Environment available and ready to complete POC agreed upon by engineer and customer

Activate - Dynamics 365 Customer Insights - Data Copilot

Description	Learn how to enable and work in Dynamics 365 Customer Insights Data (CI – D) Copilot. Gain experience through a combination of demo combined with expert instruction on the Copilot features.
Duration and Level	<ul style="list-style-type: none">• 1 Day• Level 300
Detailed Agenda	<ul style="list-style-type: none">▪ Enable Dynamics 365 Customer Insights Data Copilot▪ Target the right customers using query assist▪ Enabling “dialogue with the data”▪ Insights are proactively recommended along with other related questions to encourage deeper exploration of their data.▪ Segment & measure creation based on user’s query provided as an option to be executed in a few clicks.
Participants	Active Dynamics 365 Customer Insights Data users and System Administrators.
Skill Requirements	<ul style="list-style-type: none">• Knowledge and Experience with Customer Insights Data Application• Customer Insights environment configured
Delivery Requirements	<ul style="list-style-type: none">• Computer with Windows 10 or later, audio equipment, internet access and at least 1 Mbps bandwidth per participant• Microsoft Teams for remote deliveries• A modern browser capable of rendering web sites that use current web standards• Completion of trial environment set up with Sales Insights premium provisioned as explained in set up document prior to Workshop• Environment available and ready to complete POC agreed upon by engineer and customer

For more information: Please contact your Microsoft Representative for more details.