

Implementing Dynamics 365 Customer Insights

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Your Presenter

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- Based in Minneapolis, MN USA
- 19 years with Power Platform / Dynamics 365
- Technical Architect and Trainer, SQL & Power BI reporting, DAX, Power Apps, Power Automate, PVA, RPA, Customer Insights, SharePoint,
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Module 00

Course Introduction

Course Objectives

This course is designed for Dynamics 365 Functional Consultants, Data Engineers, System Architects, or those in equivalent roles. You will learn:

- How to provision and deploy an end-to-end Customer Insights solution, from ingesting data to activating insights with a 360-degree view of your customer.
- The architecture of Customer Insights, patterns for successful solution deployments
- How to adapt and extend Customer Insights to operate with Dynamics 365 apps and the Power Platform.

Course Outline

Sessions	Presentations and Demonstrations	Labs	Level
1-2	Module 1: Introducing Customer Insights Module 2: Customer Insights Solutions Architecture Module 3: Design the Solution	Module 1 lab – Provision Environment	200-300
3-4	Module 4: Build the Solution	Labs 2, 3, 4	200-300
5-6	Module 5: Extend the Solution to Dynamics 365 Module 6: Extend the Solution to Power Platform	Module 5 Lab Module 6 Lab	200-300
7	Module 7: Advanced topics in data ingestion, scale, AI & ML, and developer APIs	Module 7 Lab	300-400

Course Prerequisites

Students taking this course should have the following prerequisite knowledge and skills:

A good understanding of basic customer organizations requirements for marketing, sales, and/or customer service that will be ideal.

A history of listening to organization pain points and providing functional solutions using Microsoft technologies.

Labs

Lab 1: Provision the Infrastructure

Lab 2: Data Ingestion, Unification, Relationships & Measures

Lab 3: Segments, Customer Cards, Activities, Enrichment

Lab 4: Intelligence

Lab 5: Extend the Solution with Dynamics 365

Lab 6: Extend the Solution with Power Platform

Lab 7: Advanced Topics

Lab 1 – Configuring the Lab Environment

In this lab you will configure the environment for the labs in the course.

Step 1 - Browser Profile

Step 2 – Office 365 Trial

Step 2 – Power Apps License

Step 3 – Power BI Desktop

Step 5 – Dynamics 365 Marketing Trial

Step 6 – Customer Insights Trial

Lab scenario preview - introduction

Contoso Coffee produces high-quality coffee and coffee machines, which they retail through channels including new Contoso Retail Stores in premium locations, premium food resellers and the Contoso Coffee Web Site.

Contoso plans to further expand their offerings with Contoso Cafés and a new Connected Coffee Machine which can trigger refill orders and alert Contoso service about any issues.

This new offering will help them to build direct relationship with their customers and learn more about how customers consume their products



Lab scenario preview – business objective

Transactional Relationship

Existing business model means that they have lack of direct relationship with their customer.

Data Silos

Unable to deliver personalised customer experiences

Business Objective

Own and build a meaningful, direct relationship with all consumers to deliver an exceptional, personalised customer experience through relevant communications, personalised recommendations and services.

Increase customer attraction and retention by making customers feel valued through experiences that customers love



Lab scenario preview – data landscape

Fractured Customer Data

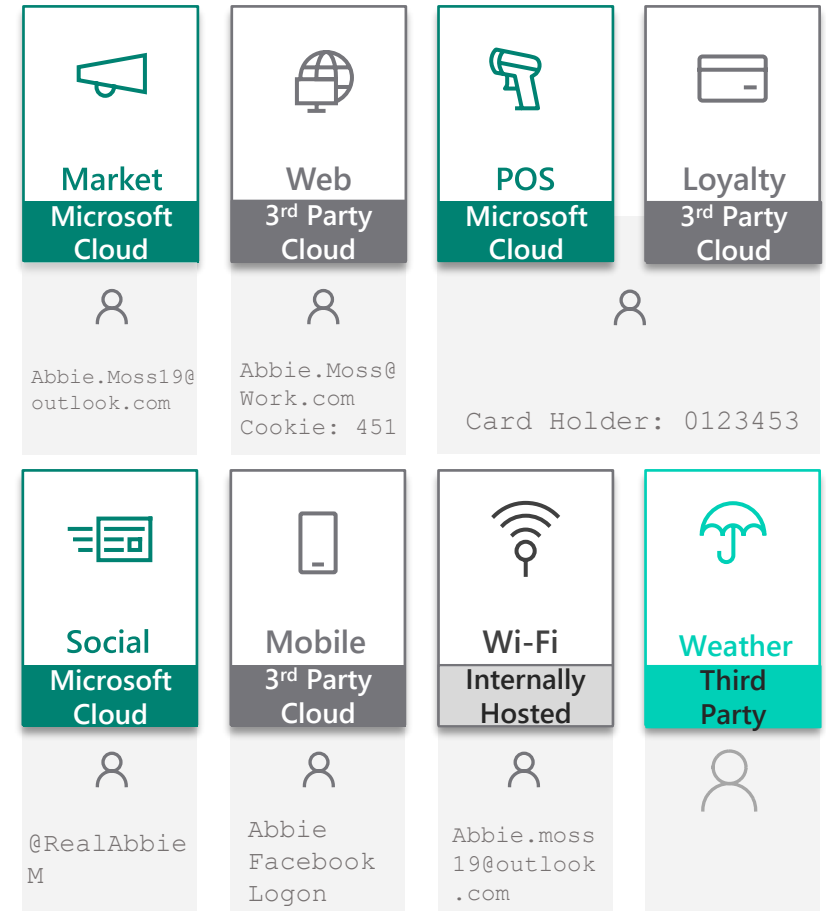
With multiple systems, Contoso has multiple records for the same person. This causes a disjointed **experience** to the customer who expects to be treated as one person regardless of the **channel** they are transacting upon.

Multiple Platforms

The architecture at Contoso has evolved through acquisition and legacy systems meaning that data can reside in not only different systems, but different platforms across multiple clouds and on premise.

Non-Customer Data

Contoso are drawing correlations between non-customer data and the impact it has on customer experiences, including data from third parties such as weather data.



Lab scenario preview – customer insights project

Contoso Coffee Customer Insights Project

Contoso management is tasking IT and Line of Business teams with the following:

- Establish a customer data platform combining all customer related data from siloed sources

- Realize a unified Contoso Customer profile

- Calculate measures for all channels offered by Contoso

- Provide a 360-degree view of the customer for service agents (embedded into D365 for Service)

- Deliver a Contoso Coffee Greeter App, to enable in store retail staff to deliver personalized service and recommendations.

- Use Power BI to uncover further insights for different functions of the Contoso Coffee business.



Lab Data Source Overview

