Microsoft Cloud for Retail

In A Day

Module 01: Solution Center

Step-by-Step Lab

March 2022

Contents

Exercise 1: Create and Configure Dynamics 365 Customer Insights Environment

In this exercise, you will create and configure a Dynamics 365 Customer Insights environment in order to deploy the Retail Churn Model.

Dynamics 365 Customer Insights is a part of Microsoft's customer data platform (CDP) that helps deliver personalized customer experiences. The platform's capabilities provide insights into who your customers are and how they engage with your platform. Unify customer data across multiple sources to get a single view of customers.

- Audience insights helps you transform your business into a customer-centric organization. Marketing, sales, and service professionals have the insights they need to personalize experiences. Connect data from transactional, behavioral, and observational sources to create a 360-degree customer view. See results faster with a CDP designed to deliver insights that can be acted upon.
- Retail channel churn predictive model: Retail channel churn predictive model, a key feature of Unified customer profile, uses an AI-based model to help omnichannel retailers use cross-channel data to assess the chance that a customer will churn—stop actively buying.

Task 1: Create Customer Insights Environment

In this task you will create a new Customer Insights sandbox environment. To set **Customer intelligence** up correctly, you must first create a Customer Insights sandbox environment and connect it to your Dataverse environment with no Data Sources specified. Once connected, you will go through Solution Center and deploy **Customer intelligence** from **Unified customer profile**, specifying the Customer Insights environment that you create in this task.

1. Using an In-Private or Incognito window, navigate to https://home.ci.ai.dynamics.com/ and log in with the credentials provided by your instructor in the training information document.
2. If not already selected, select **Audience insights** as your focus.
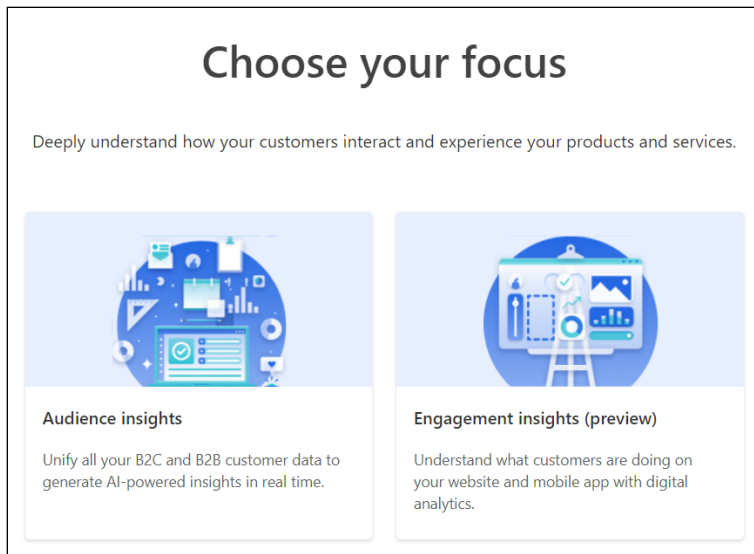
3. Your screen would look like this with Audience Insights selected:
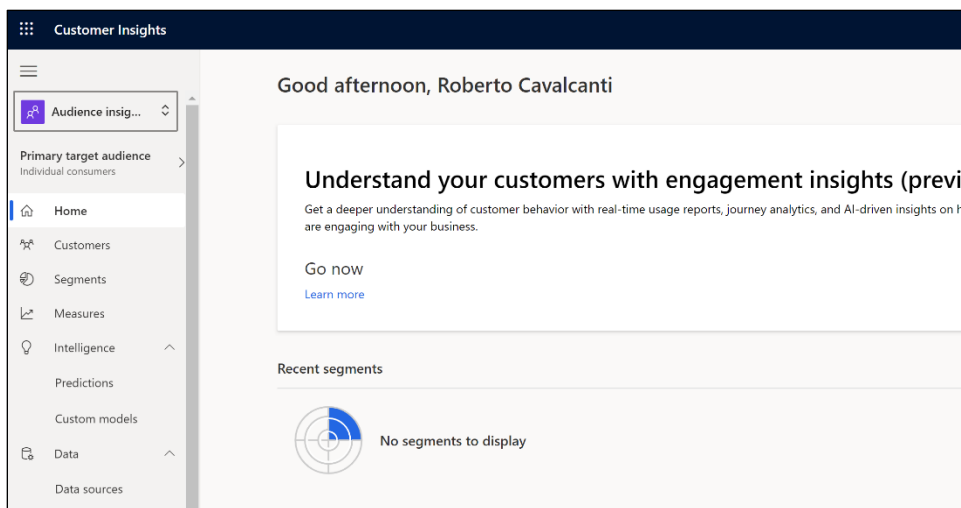
4. In the top right corner of the screen, click on the environment name and then click **+ New** to create a new environment
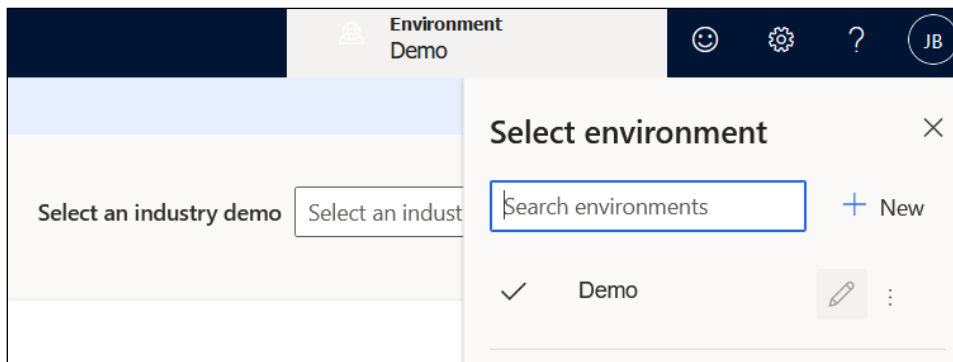
5. Fill out the appropriate fields and click **Next**.
   a. **Name**: <<UserName>> Retail Churn
   b. **Choose your business**: Individual consumers (B-to-C)
   c. **Type**: Pitch Demo
   d. **Region**: West US

6. **Deselect** Power BI Reporting and click **Next**.

7. Leave **Customer Insights storage** selected and click **Next**.

8. Leave the Microsoft Dataverse environment URL blank and click **Next**.

9. Click **Create**.

Create an environment   ✕

- ✓ Basic information
- ✓ Advanced reporting
- ✓ Data storage
- ✓ Microsoft Dataverse
- ● Review

Review

Basic information   Edit
Name: Retail Churn
Audience type: Individual consumers (B-to-C)
Type: PitchDemo
Region: West US

Advanced reporting   Edit
User capacity selected: No

Data storage   Edit
Output storage type: Customer Insights storage

Microsoft Dataverse   Edit
Server address: --
Enable data sharing: No

[Back]   [**Create**]   [Cancel]

10. Wait for the environment to be created


Almost done ... Getting everything ready.
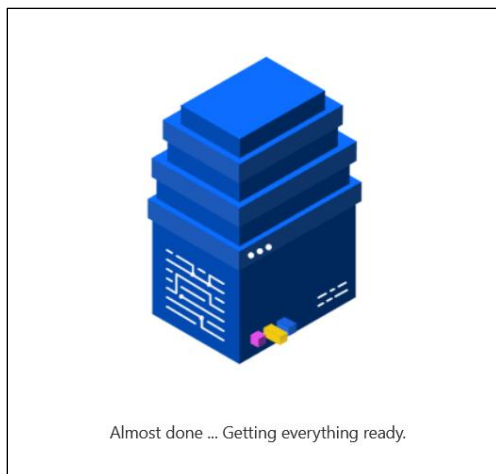
Congratulations! You have successfully created a CI environment.

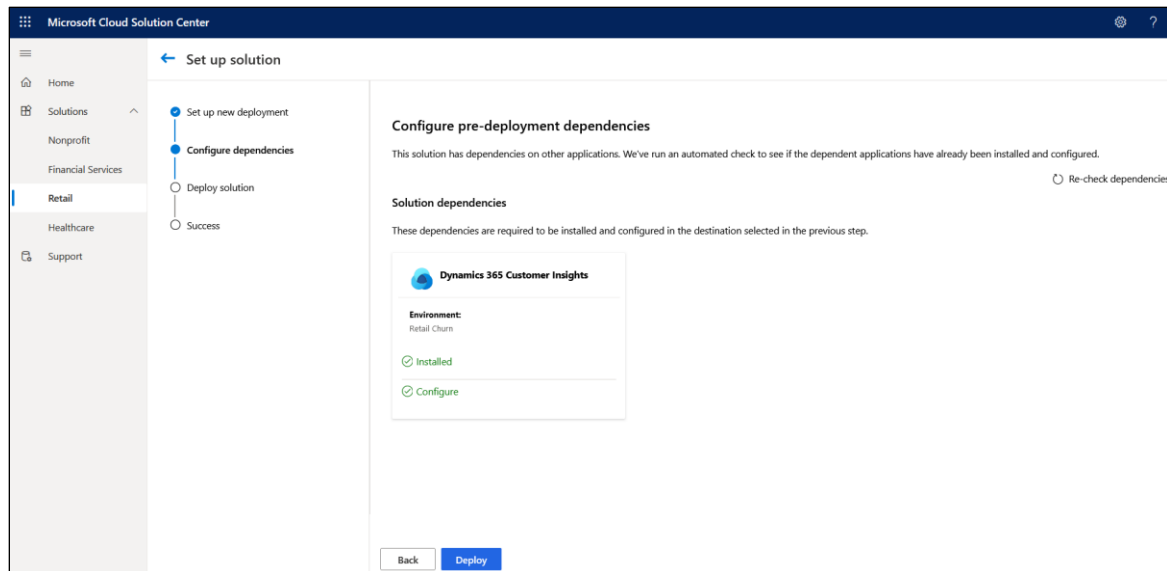## Task 2: Deploy Retail Churn Model

1. Open a **new tab** in in-private browser tab and navigate to the Microsoft Cloud Solution Center at solutions.microsoft.com with the credentials provided by the instructor in the training information document.
2. Expand **Retail** and navigate to **Unified customer profile**. Check **Add** next to Unified customer profile and then click **Deploy**.
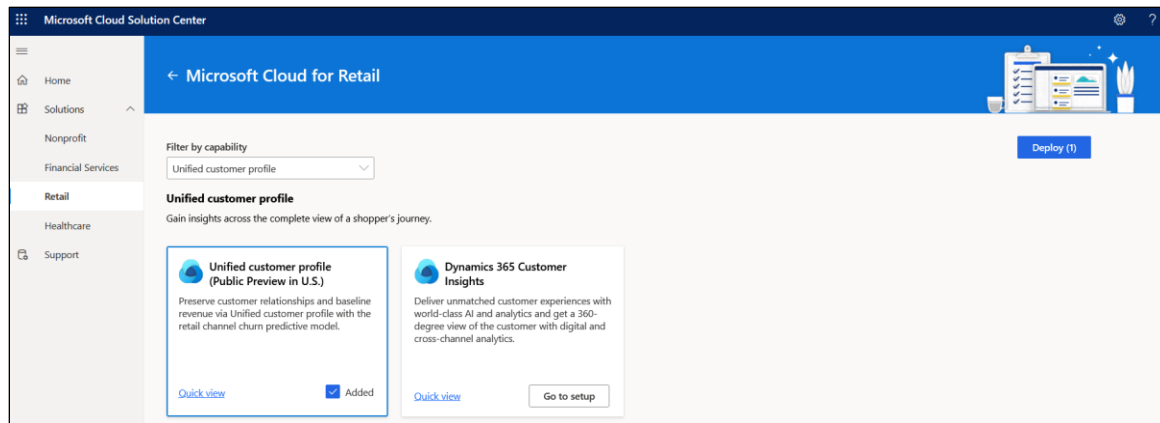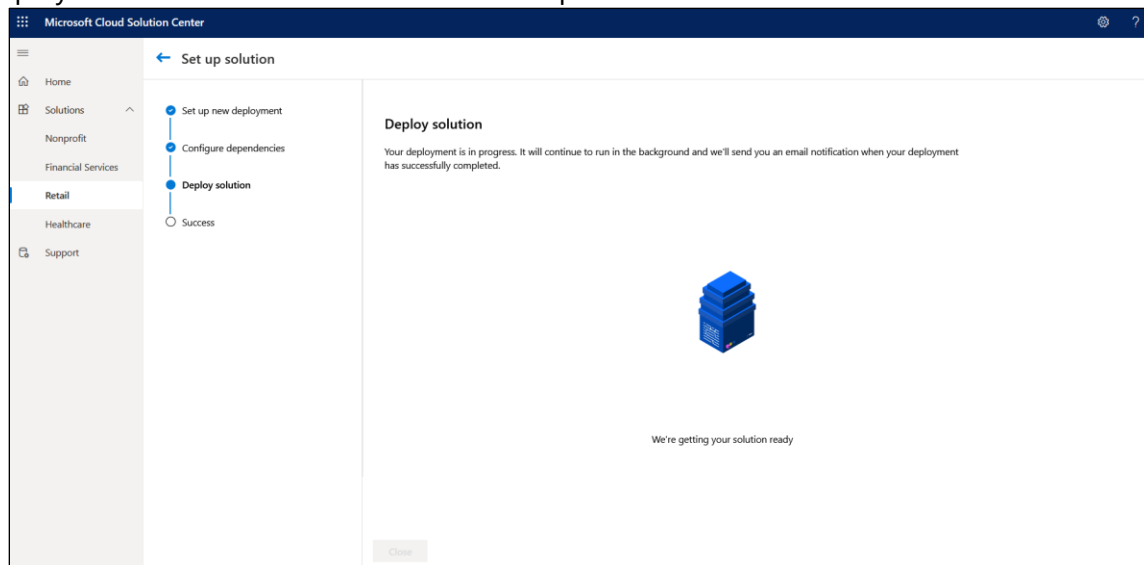
3. Select the **Customer Insights Environment** that you created in the previous task, **provide a name** for your deployment, **agree** to the terms and conditions, and click **Next**.
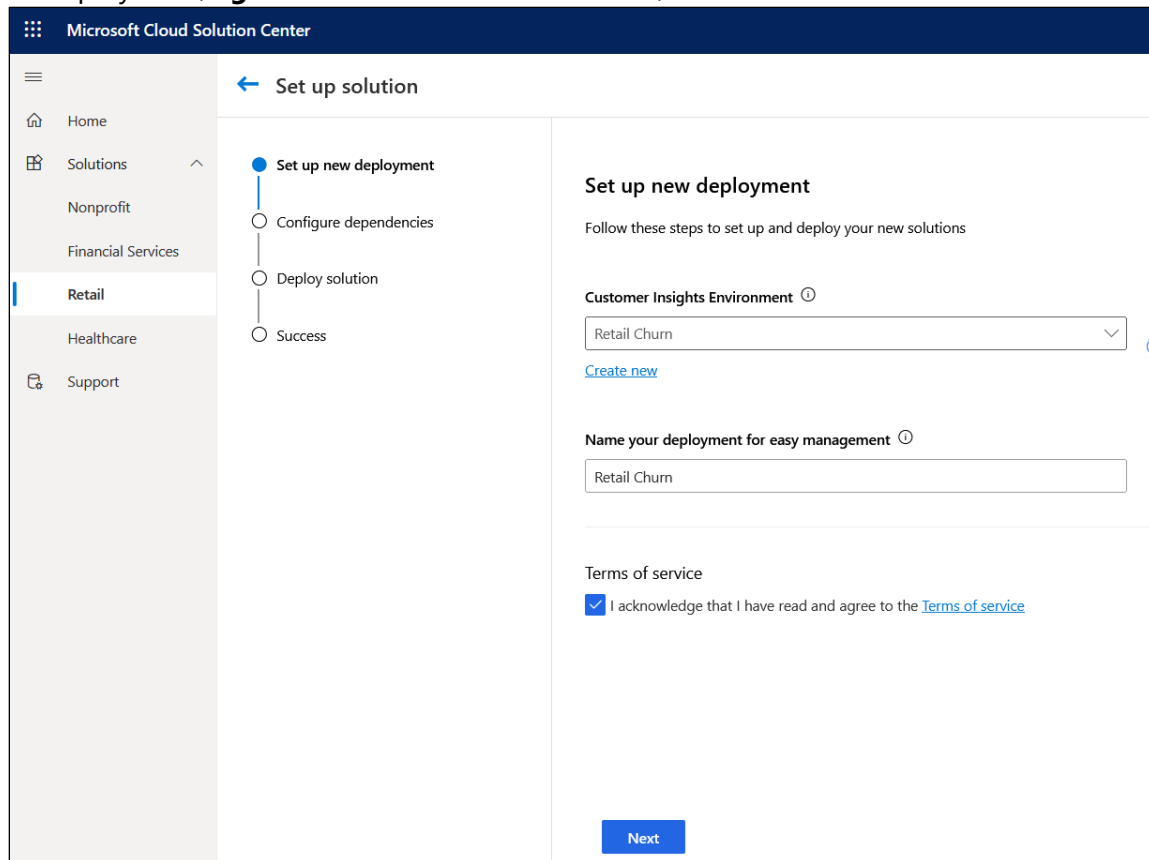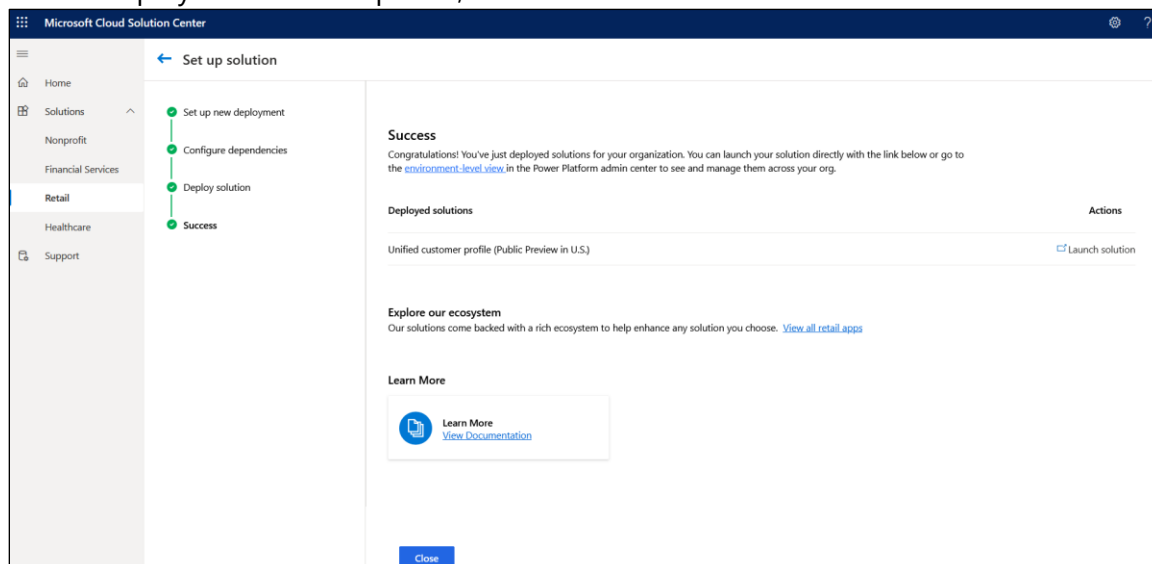

4. Click Deploy to deploy the Retail Churn model to your Customer Insights environment.

5. Deployment will take several minutes to complete.

6. Once the deployment has completed, click **Close**.

Congratulations! You have successfully deployed Retail Churn Model.

Summary

Nice work! You have completed the lab for Microsoft Coud for Retail Solution Center.

In this lab, you learned how to do the following:

1. Create a D365 Customer Insights Environment
2. Deploy Retail Churn Model via Solution Center