

Study guide for Exam MB-260: Microsoft Customer Data Platform Specialist

Purpose of this document

This study guide should help you understand what to expect on the exam and includes a summary of the topics the exam might cover and links to additional resources. The information and materials in this document should help you focus your studies as you prepare for the exam.

| Useful links | Description |
|--|---|
| Review the skills measured as of April 19, 2023 | This list represents the skills measured AFTER the date provided. Study this list if you plan to take the exam AFTER that date. |
| Review the skills measured prior to April 19, 2023 | Study this list of skills if you take your exam PRIOR to the date provided. |
| Change log | You can go directly to the change log if you want to see the changes that will be made on the date provided. |
| How to earn the certification | Some certifications only require passing one exam, while others require passing multiple exams. |
| Certification renewal | Microsoft associate, expert, and specialty certifications expire annually. You can renew by passing a free online assessment on Microsoft Learn. |
| Your Microsoft Learn profile | Connecting your certification profile to Microsoft Learn allows you to schedule and renew exams and share and print certificates. |
| Exam scoring and score reports | A score of 700 or greater is required to pass. |
| Exam sandbox | You can explore the exam environment by visiting our exam sandbox. |
| Request accommodations | If you use assistive devices, require extra time, or need modification to any part of the exam experience, you can request an accommodation. |

| Useful links | Description |
|--------------------------------------|--|
| Take a practice test | Are you ready to take the exam or do you need to study a bit more? |

Updates to the exam

Our exams are updated periodically to reflect skills that are required to perform a role. We have included two versions of the Skills Measured objectives depending on when you are taking the exam.

We always update the English language version of the exam first. Some exams are localized into other languages, and those are updated approximately eight weeks after the English version is updated. While Microsoft makes every effort to update localized versions on this schedule, there may be times when localized versions of an exam are not updated on this schedule. Other available languages are listed in the **Schedule Exam** section of the **Exam Details** webpage. If the exam isn't available in your preferred language, you can request an additional 30 minutes to complete the exam.

Note

The bullets that follow each of the skills measured are intended to illustrate how we are assessing that skill. Related topics may be covered in the exam.

Note

Most questions cover features that are general availability (GA). The exam may contain questions on Preview features if those features are commonly used.

Skills measured as of April 19, 2023

Audience profile

Candidates for this exam implement solutions that provide insights into customer profiles and that track engagement activities to help improve customer experiences and increase customer retention.

Candidates should have firsthand experience with Dynamics 365 Customer Insights and one or more additional Dynamics 365 apps, Microsoft Power Query, Microsoft Dataverse, Common Data Model, and Microsoft Power Platform. They should also have direct experience with practices related to privacy, compliance, consent, security, responsible AI, and data retention policy.

Candidates need experience with processes related to KPIs, data retention, validation, visualization, preparation, matching, fragmentation, segmentation, and enhancement. They should have a general understanding of Azure Machine Learning, Azure Synapse Analytics, and Azure Data Factory.

- Design Customer Insights solutions (5–10%)
- Ingest data into Customer Insights (10–15%)
- Create customer profiles through data unification (25–30%)
- Implement AI predictions in Customer Insights (5–10%)
- Configure measures and segments (15–20%)

- Configure third-party connections (10–15%)
- Administer Customer Insights (5–10%)

Design Customer Insights solutions (5–10%)

Describe Customer Insights

- Describe Customer Insights components, including entities, relationships, activities, measures, and segments
- Describe support for near real-time updates
- Describe support for enrichment
- Describe the differences between individual profiles or business accounts.

Describe use cases for Customer Insights

- Describe use cases for Customer Insights
- Describe use cases for extending Customer Insights by using Microsoft Power Platform components
- Describe use cases for Customer Insights APIs
- Describe use cases for working with business accounts

Ingest data into Customer Insights (10–15%)

Connect to data sources

- Determine which data sources to use
- Determine whether to use the managed data lake or an organization's data lake
- Attach to a Microsoft Dataverse data lake
- Attach to Azure Data Lake Storage
- Ingest and transform data using Power Query connectors
- Attach to Azure Synapse Analytics
- Describe real-time ingestion capabilities and limitations
- Describe benefits of pre-unification data enrichment
- Ingest and update data in real-time

Transform, cleanse, and load data by using Power Query

- Select tables and columns
- Resolve data inconsistencies, unexpected or null values, and data quality issues
- Evaluate and transform column data types
- Apply data shape transformations to tables

Configure incremental refreshes for data sources

- Identify data sources that support incremental updates
- Configure incremental refresh
- Identify capabilities and limitations for scheduled refreshes

- Configure scheduled refreshes and on-demand refreshes

Create customer profiles through data unification (25–30%)

Select source fields

- Select Customer Insights entities and attributes for unification
- Select attribute types
- Select the primary key

Remove duplicate records

- Deduplicate enriched entities
- Define deduplication rules
- Review deduplication results

Match conditions

- Specify a match order for entities
- Define match rules
- Define exceptions
- Include enriched entities in matching
- Configure normalization options
- Differentiate between basic and custom precision methods

Unify customer fields

- Specify the order of fields for merged tables
- Combine fields into a merged field
- Combine a group of fields
- Separate fields from a merged field
- Exclude fields from a merge
- Change the order of fields
- Rename fields
- Configure customer ID generation
- Group profiles into Clusters

Review data unification

- Review and create customer profiles
- View the results of data unification
- Verify output entities from data unification
- Update the unification settings

Configure search and filter indexes

- Define which fields should be searchable
- Define filter options for fields

- Define indexes

Configure relationships and activities

- Create and manage relationships
- Create activities by using a new or existing relationship
- Create activities in real-time
- Manage activities
- Combine customer profiles with activity data from unknown users

Implement AI predictions in Customer Insights (5–10%)

Configure prediction models

- Configure and evaluate the customer churn models, including the transactional churn and subscription churn models
- Configure and evaluate the product recommendation model
- Configure and evaluate the customer lifetime value model
- Create a customer segment based on prediction model
- Configure and manage sentiment analysis

Implement machine learning models

- Describe prerequisites for using custom Azure Machine Learning models in Customer Insights
- Implement workflows that consume machine learning models
- Manage workflows for custom machine learning models

Configure measures and segments (15–20%)

Create and manage measures

- Create and manage tags
- Describe the different types of measures
- Create a measure
- Create a measure by using a template
- Configure measure calculations
- Modify dimensions

Create and manage segments

- Create and manage tags
- Describe methods for creating segments, including segment builder and quick segments
- Create a segment from customer profiles, measures, or AI predictions
- Create a segment based on a prediction model
- Find similar customers
- Project attributes
- Track usage of segments

- Export segments

Find suggested segments

- Describe how the system suggests segments for use
- Create a segment from a suggestion
- Create a suggested segment based on activity
- Configure refreshes for suggestions

Create segment insights

- Configure overlap segments
- Configure differentiated segments
- Analyze insights
- Find similar segments with AI

Configure third-party connections (10–15%)

Configure connections and exports

- Configure a connection for exporting data
- Create a data export
- Define types of exports
- Configure on demand and scheduled data exports
- Define the limitations of segment exports

Export data to Dynamics 365 Marketing or Dynamics 365 Sales

- Identify prerequisites for exporting data from Customer Insights
- Create connections between Customer Insights and Dynamics 365 apps
- Define which segments to export
- Export a Customer Insights segment into Dynamics 365 Marketing as a marketing segment
- Use Customer Insights profiles and segments with real-time marketing
- Export a Customer Insights profile into Dynamics 365 Marketing for customer journey orchestration
- Export a Customer Insights segment into Dynamics 365 Sales as a marketing list

Display Customer Insights data from within Dynamics 365 apps

- Identify Customer Insights data that can be displayed within Dynamics 365 apps
- Configure the Customer Card add-in for Dynamics 365 apps
- Identify permissions required to implement the Customer Card Add-in for Dynamics 365 apps

Implement Data Enrichment

- Enrich customer profiles
- Configure and manage enrichments
- Enrich data sources before unification

- View enrichment results

Use Customer Consent data

- Add Consent Data to Customer Insights
- Use Consent Data

Administer Customer Insights (5–10%)

Create and configure environments

- Identify who can create environments
- Differentiate between trial and production environments
- Connect Customer Insights to Microsoft Dataverse
- Connect Customer Insights with Azure Data Lake Storage Account
- Manage existing environments
- Change or claim ownership of the environment
- Reset an existing environment
- Configure user permissions
- Describe available user permissions

Manage system refreshes

- Differentiate between system refreshes and data source refreshes
- Describe refresh policies
- Configure a system refresh schedule
- Monitor and troubleshoot refreshes

Create and manage connections

- Describe when connections are used
- Configure and manage connections

Study resources

We recommend that you train and get hands-on experience before you take the exam. We offer self-study options and classroom training as well as links to documentation, community sites, and videos.

| Study resources | Links to learning and documentation |
|---------------------------|---|
| Get trained | Choose from self-paced learning paths and modules or take an instructor-led course |
| Find documentation | Dynamics 365 documentation and learning modules Dynamics 365 Customer Insights documentation |
| Ask a question | Microsoft Q&A Microsoft Docs |

| Study resources | Links to learning and documentation |
|-------------------------------|--|
| Get community support | Microsoft Dynamics Community |
| Follow Microsoft Learn | Microsoft Learn - Microsoft Tech Community |

Change log

Key to understanding the table: The topic groups (also known as functional groups) are in bold typeface followed by the objectives within each group. The table is a comparison between the two versions of the exam skills measured and the third column describes the extent of the changes.

| Skill area prior to April 19, 2023 | Skill area as of April 19, 2023 | Changes |
|--|--|---------------------|
| Audience profile | | No change |
| Design Customer Insights solutions | Design Customer Insights solutions | No change |
| Describe Customer Insights | Describe Customer Insights | No change |
| Describe use cases for Customer Insights | Describe use cases for Customer Insights | No change |
| Ingest data into Customer Insights | Ingest data into Customer Insights | % of exam decreased |
| Connect to data sources | Connect to data sources | Minor |
| Transform, cleanse, and load data by using Power Query | Transform, cleanse, and load data by using Power Query | No change |
| Configure incremental refreshes for data sources | Configure incremental refreshes for data sources | Minor |
| Create customer profiles through data unification | Create customer profiles through data unification | % of exam increased |
| Select source fields | Select source fields | No change |
| Implement matching | | Removed |
| | Remove duplicate records | Added |
| | Match conditions | Added |
| Unify customer fields | Unify customer fields | No change |

| Skill area prior to April 19, 2023 | Skill area as of April 19, 2023 | Changes |
|--|--|---------------------|
| | Review data unification | Added |
| Configure search and filter indexes | Configure search and filter indexes | No change |
| Configure relationships and activities | Configure relationships and activities | Minor |
| Implement AI predictions in Customer Insights | Implement AI predictions in Customer Insights | No change |
| Configure prediction models | Configure prediction models | No change |
| Implement machine learning models | Implement machine learning models | No change |
| Configure measures and segments | Configure measures and segments | No change |
| Create and manage measures | Create and manage measures | No change |
| Create and manage segments | Create and manage segments | No change |
| Find suggested segments | Find suggested segments | No change |
| Create segment insights | Create segment insights | No change |
| Configure third-party connections | Configure third-party connections | % of exam decreased |
| Configure connections and exports | Configure connections and exports | No change |
| Export data to Dynamics 365 Marketing or Dynamics 365 Sales | Export data to Dynamics 365 Marketing or Dynamics 365 Sales | No change |
| Display Customer Insights data from within Dynamics 365 apps | Display Customer Insights data from within Dynamics 365 apps | No change |
| Implement Data Enrichment | Implement Data Enrichment | No change |
| Use Customer Consent data | Use Customer Consent data | No change |
| Administer Customer Insights | Administer Customer Insights | No change |
| Create and configure environments | Create and configure environments | No change |
| Manage system refreshes | Manage system refreshes | No change |
| Create and manage connections | Create and manage connections | No change |

Skills measured prior to April 19, 2023

Audience profile

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- Design Customer Insights solutions (5–10%)
- Ingest data into Customer Insights (15–20%)
- Create customer profiles through data unification (20–25%)
- Implement AI predictions in Customer Insights (5–10%)
- Configure measures and segments (15–20%)
- Configure third-party connections (15–20%)
- Administer Customer Insights (5–10%)

Design Customer Insights solutions (5–10%)

Describe Customer Insights

- Describe Customer Insights components, including entities, relationships, activities, measures, and segments
- Describe support for near real-time updates
- Describe support for enrichment
- Describe the differences between individual profiles or business accounts

Describe use cases for Customer Insights

- Describe use cases for Customer Insights
- Describe use cases for extending Customer Insights by using Microsoft Power Platform components
- Describe use cases for Customer Insights APIs
- Describe use cases for working with business accounts

Ingest data into Customer Insights (15–20%)

Connect to data sources

- Determine which data sources to use
- Determine whether to use the managed data lake or an organization's data lake

- Connect to Microsoft Dataverse
- Connect to common Data Model folders
- Connect to data sources by using Power Query connectors
- Ingest data from Azure Synapse Analytics
- Ingest data by using Azure Data Factory pipelines
- Describe real-time ingestion capabilities and limitations
- Describe benefits of pre-unification data enrichment
- Ingest data in real-time
- Update Unified Customer Profile fields in real-time

Transform, cleanse, and load data by using Power Query

- Select tables and columns
- Resolve data inconsistencies, unexpected or null values, and data quality issues
- Evaluate and transform column data types
- Apply data shape transformations to tables

Configure incremental refreshes for data sources

- Identify data sources that support incremental updates
- Configure incremental refresh
- Identify capabilities and limitations for scheduled refreshes
- Configure scheduled refreshes and on-demand refreshes
- Trigger refreshes by using Power Automate or the Customer Insights API

Create customer profiles through data unification (20–25%)

Select source fields

- Select Customer Insights entities and attributes for unification
- Select attribute types
- Select the primary key

Implement matching

- Specify a match order for entities
- Define match rules
- Define exceptions
- Include enriched entities in matching
- Configure normalization options
- Differentiate between low, medium, high, exact, and custom precision methods
- Deduplicate enriched entities
- Define deduplication rules
- Review deduplication results

Unify customer fields

- Specify the order of fields for merged tables
- Combine fields into a merged field
- Combine a group of fields
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- Group profiles into Clusters

Configure search and filter indexes

- Define which fields should be searchable
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Configure relationships and activities

- Create and manage relationships
- Create activities by using a new or existing relationship
- Create activities in real-time
- Manage activities

Implement AI predictions in Customer Insights (5–10%)

Configure prediction models

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Implement machine learning models

- Describe prerequisites for using custom Azure Machine Learning models in Customer Insights
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Configure measures and segments (15–20%)

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- Create a suggested segment based on activity
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Create segment insights

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Configure third-party connections (15–20%)

Configure connections and exports

- Configure a connection for exporting data
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- Define the limitations of segment exports

Export data to Dynamics 365 Marketing or Dynamics 365 Sales

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Use Customer Consent data

- Add Consent Data to Customer Insights
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Administer Customer Insights (5–10%)

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Create and manage connections

- Describe when connections are used

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