



2026 DYNAMICS CON

Vegas

The main title is presented in a vibrant, multi-colored, comic-book style font. '2026' is in green, 'DYNAMICS' is in yellow and green, and 'CON' is in yellow. The word 'Vegas' is written in a white, cursive script with a black outline on a yellow background. The text is set against a large, multi-colored starburst shape in shades of purple, pink, and blue. Two stylized palm trees are positioned behind the '2026' and 'DYNAMICS' text. A small, colorful geometric logo is located between 'DYNAMICS' and 'CON'. The entire graphic is set against a green background with a city skyline silhouette at the bottom and streaks of light in the sky.

The Avengers of Data

Assembling CI, Power Platform & Dataverse



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- 25+ years in technology focused on websites, portals, ecommerce, and marketing
- #1 author on Microsoft's idea forum for Customer Insights Journeys (ideas implemented)
- Passionate about marketing automation, **helping non-profits**, and tutoring
- Believes automating workflows is the adult version of solving puzzles for fun
- Blends consulting with creativity - a data nerd and a designer
- Runs an Etsy shop to test out marketing, technology, and creative theories
- Once explained marketing automation concepts using gummy bears... and it worked



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<https://www2.perficient.com/prft/dynamicscon-2026>

Getting to Know You

- Who uses Customer Insights – **Journeys** today?
- Who uses Customer Insights – **Data** today?
- Who uses **both** today?

- What industry are you in – and is it B2B or B2C?

- Who is here primarily from
 - Marketing?
 - IT?
 - Data or Reporting?



Agenda

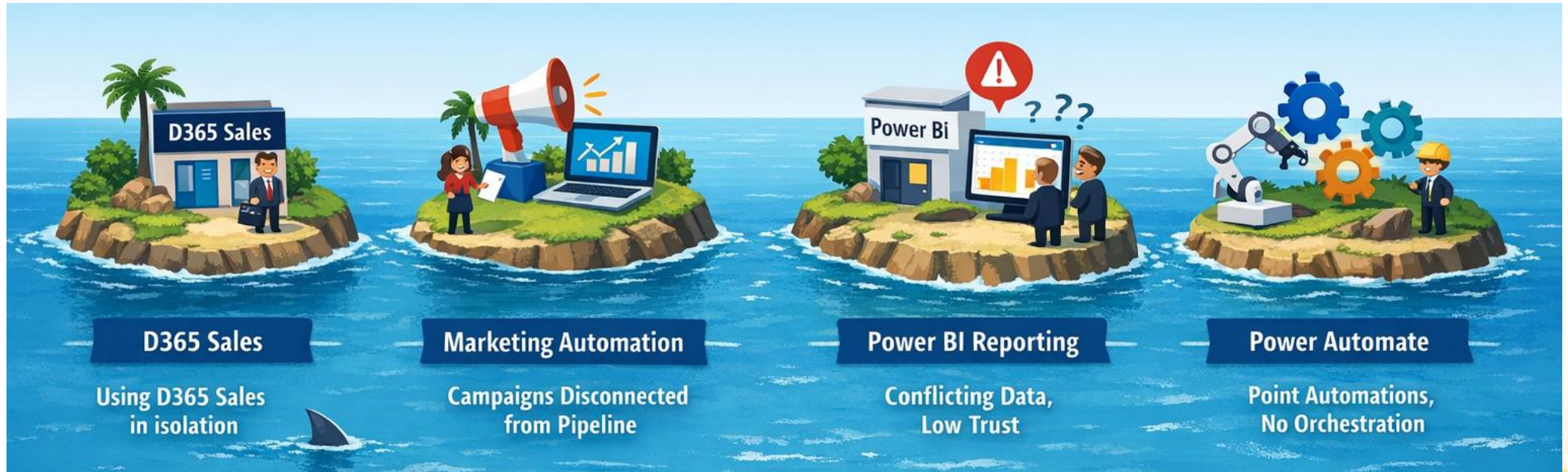
- The Problem & The Opportunity
- What is Customer Insights?
- How To:
 - Surface Unified Data in D365 Sales (Contact)
 - Surface Unified Data in Power BI (Report)
 - Trigger Power Automate from a Marketing Interaction
- Key Takeaways & Resources
- What's Next: From Connected Systems to Connected Agents
- Bonus Slides
 - How to connect CIJ to CID
 - How to disconnect CIJ from CID
 - How to remove an instance of CID



The Problem

Disconnected Systems → The Goal: A Connected Customer Experience

- Sales reps can't see marketing + behavioral signals
- Executives don't trust dashboards (data ≠ unified)
- Marketing can't trigger operational action (no automation bridge)

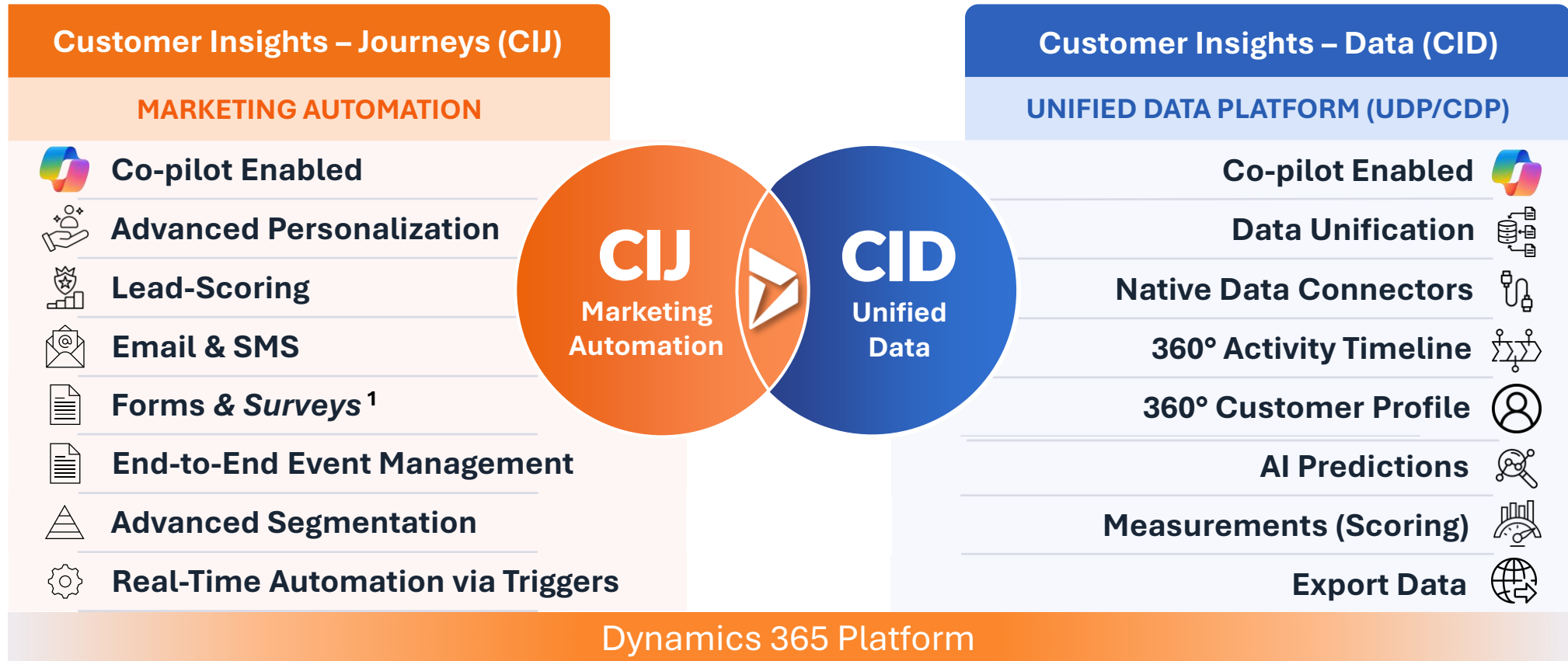


The Opportunity

- **Single, Unified Customer View (360°)**
Sales, Marketing, and Leadership operate from the same real-time customer profile - eliminating data gaps and enabling more informed, confident decisions.
- **Aligned Revenue Engine Across Sales & Marketing**
Marketing engages with precision using unified data, while Sales gains full visibility into campaign engagement driving higher conversion and pipeline efficiency.
- **Trusted, Consistent Reporting Across the Organization**
Power BI delivers insights from a single source of truth, restoring leadership confidence in dashboards and enabling faster, data-driven decisions.
- **Intelligent, End-to-End Automation**
Power Automate orchestrates workflows across systems, triggering actions based on unified data reducing manual effort and improving responsiveness.



What is Customer Insights?



¹ Customer Voice Surveys are *not* a feature of Customer Insights. It is a feature typically included with D365 Sales/Customer Service.



What Sets Customer Insights Apart?

- Can be used
 - standalone CRM/Marketing platform OR
 - with Dynamics (no integration needed, uses same dataverse) OR
 - with 3rd party CRMs (i.e. Salesforce)
- Supports an unlimited number of users & environments
- One license, one price for full platform access. No feature-based tiers.
- No 3rd party plugins or add-ons needed for features, they're all OTB.
- Many native connectors for use with other 3rd party applications
- Connect to external data sources & unify data **without impacting CRM data**



How Does Microsoft Charge for D365 CI?

Base license is \$1K/month for orgs w/ a qualifying D365 app OR \$1,700/month standalone

D365 Customer Insights – Journeys (CIJ) MARKETING AUTOMATION

- Microsoft charges for CIJ based on the number of **people you interact with** through email, text, forms, events, lead-scoring, etc.
 - **NOT the total number of people in your CRM.**
- **The base license** allows you to interact with 10,000 users. If you need more, you can purchase additional interacted user packs.
- **EXAMPLE**
You have 50K Contacts & Leads in your CRM but only 8K interact with CIJ. You are covered under the base license (which supports up to 10K)

D365 Customer Insights – Data (CID) DATA UNIFICATION

- Microsoft charges for CID based on the number of **unified profiles created**.
 - **NOT the total number of people in every system**
- **The base license** supports creation of 100,000 unified profiles. If you need more, you can purchase additional unified profile packs.
- **EXAMPLE**
You have 50K Contacts in your CRM and 80K Customers in your eCommerce platform. Unification creates 60K unified profiles. 60K is covered under the base license (which supports up to 100K)



How to Setup D365 Customer Insights – Data (CID)

1. First, create your environment by navigating to home.ci.ai.dynamics.com
 - a. Click the environment in upper right corner
 - b. Click + New
 - Enter a Name for your environment
 - Select a Type (i.e. Sandbox)
 - Confirm your Region
 - Click Next
 - c. Select Customer Insights – Data Storage for Save Output Data To* & Click Next
 - d. Select the Dataverse where you have D365 Sales* & Click Next
 - e. Click Create

* These steps are required to surface Unified Data to D365 Sales using OTB methods



How to Setup D365 Customer Insights – Data (CID)

2. Then, connect your Data Sources starting w/ the D365 Sales Dataverse
 - a. Go to <https://home.ci.ai.dynamics.com> & select your environment (upper right corner)
 - b. Expand Data & click Data Sources
 - c. Click + Add a data source
 - Select Microsoft Dataverse
 - Enter a Name for your Dataverse
 - Enter the URL for your Dataverse (where you access D365 Sales like microsoftdemo.crm.dynamics.com)
 - Click Next
 - d. Select the Tables you want to include in your unified profile (at minimum, select Contact*)
 - e. Click Save

* These steps are required to surface Unified Data to D365 Sales using OTB methods



How to Setup D365 Customer Insights – Data (CID)

3. Continue connecting your data sources – if there's a Power Query connector, follow these steps:
 - a. Go to <https://home.ci.ai.dynamics.com> & select your environment (upper right corner)
 - b. Expand Data & click Data Sources
 - c. Click + Add a data source
 - Select Microsoft Power Query
 - Enter a Name for your Data Source
 - Click Next
 - d. Search for the Power Query Connector (i.e. Excel workbook)
 - e. Follow the Wizard until the final step & click Save



How to Setup D365 Customer Insights – Data (CID)

4. Once you've added your Data Sources, its time to Unify!
 - a. Go to <https://home.ci.ai.dynamics.com> & select your environment (upper right corner)
 - b. Expand Data & click Unify
 - c. Click the button in the Customer Data box to start
 - Select the Tables & Columns from each Data Source that you want to include in the unified profile
 - Be sure to set ContactID as the Primary Key on the Contact table from the Dataverse* even if you are going to match on a different field
 - d. Follow the Wizard to:
 - a. Transform your data**
 - b. Create deduplication rules
 - c. Create matching rules
 - d. Create the Unified Profile view

* This step is required to surface Unified Data to D365 Sales using OTB methods

** I've personally found this step to be the most difficult – your data must meet strict guidelines like no spaces in the column headings but I haven't found clear documentation on this



How to Setup D365 Customer Insights – Data (CID)

5. Once you've Unified – be sure to Review/Complete to create the CustomerProfile entity!



How to Surface Unified Data in D365 Sales

There are multiple ways to surface data depending on:

1. How you've setup/configured CID and
2. What data you're trying to surface (customer profile, measures, insights, etc.)

Three methods to surface data are:

1. **Native D365 Form (OTB)***
used to display unified data mapped to the CustomerProfile table in dataverse
2. **Customer Insights Customer Card Add-in (preview/OOTB)***
used to display measures and insights generated by CID
https://marketplace.microsoft.com/en-us/product/dynamics-365/mscrm.dynamics_365_customer_insights_customer_card_addin
3. **Canvas App (custom development)**
used to display unified data, measure & insights

** These two methods will be demonstrated today*



Pre-Requisites for Surfacing Unified Data in D365 Sales OTB

1. When you setup CID, you must choose your Data Storage
 - To display unified data in D365 Sales using the process demonstrated today – **you must choose Customer Insights – Data Storage**
 - If you choose an Azure Data Lake – this process will not work & instead you will need to build a Canvas app

Create an environment [Close]

- Basic information
- Data storage**
- Microsoft Dataverse
- Review

Data storage

Azure Data Lake storage for your high performance Customer Insights - Data work loads.

Save output data to *

Customer Insights - Data storage

Customer Insights - Data storage

Azure Data Lake Storage Gen2

Pre-Requisites

for Surfacing Unified Data in D365 Sales OTB

2. When unifying your data, you must choose a primary key
 - To display unified data in D365 Sales using the process demonstrated today – **you must make ContactID from the Contact table in your dataverse the PRIMARY KEY**
 - If you do not – this process will not work & instead you will need to build a Canvas app

Unify

Save source columns Select tables and columns

Describe the customer data to be unified

Choose the tables and columns to be unified, specifying primary keys for each table and a descriptive type for each column. [Learn about customer data](#)

Tables	Fields
D365SalesData contact	Select the primary key contactid
EventDynamicsCon2026 Contacts	

Pre-Requisites

for Surfacing Unified Data in D365 Sales OTB

3. Install & configure the Customer Insights Customer Card Add-in (preview)

- Download here:
https://marketplace.microsoft.com/en-us/product/dynamics-365/mscrm.dynamics_365_customer_insights_customer_card_addin?tab=overview
- Instructions for install & configuration:
<https://learn.microsoft.com/en-us/dynamics365/customer-insights/data/customer-card-add-in>



Confirm Pre-Requisites

for Surfacing Unified Data in D365 Sales OTB

- **Verify** that these 2 tasks have run successfully by navigating to CID > Your Environment > System:

ProfileCustomerEntity	✓ Successful	9 hours ago
CustomerId Backstamping Hydration	✓ Successful	9 hours ago

- **Customer Profile (msdyn_ci_customerprofile)**
this table will be automatically added to your dataverse after successfully unifying data
- Now you can **create/update your D365 forms** in Sales to display unified data by adding columns from the new Customer Profile table (I recommend adding CustomerProfile to your navigation in CIJ & Sales)

Live Demo

Surface Unified Data in D365 Sales



How to Surface Unified Data in Power BI

- First decide if you will create from scratch or start from a sample provided by Microsoft: [What Are Power BI Samples - Power BI | Microsoft Learn](#)
- Open Power BI desktop or go to app.powerbi.com
- Select or create a Workspace
- To start from scratch: select + New item > Dashboard or Report
 - Select Get Data
 - Search for Customer Insights
 - Select Dynamics 365 Customer Insights (Preview)
 - Sign-in to your Microsoft account (with access to CID)
 - Find your CID environment & select the entity Customer
 - Optional: Transform your data
 - Select Create a Report
 - Select a Semantic Model or Create New
 - Build Your Report or Dashboard!



Live Demo

Surface Unified Data in Power BI



How to Trigger Power Automate from a Marketing Interaction: Part 1

- Navigate to Customer Insights – Journeys > Triggers
- Click + New Trigger
 - Choose When a customer interacts with a website/app
 - Click Create
 - Choose Contact, Lead, or Customer Profile
(Customer Profile will only appear if CIJ is connected to CID)
 - Add all of the attributes that you want to pass from the Journey/dataverse to the Power Automate Flow & Click Next
 - Click Next
 - Click Ready to Use



How to Trigger Power Automate from a Marketing Interaction: Part 2

- Navigate to Power Automate (make.powerautomate.com)
- Select Your Environment (upper right corner)
- Click Create
 - Click Automated Cloud Flow
 - Enter a Name
 - Select When an Action is Performed & Click Create
 - Select the Tile When an Action is Performed
 - Set Catalog to Cxp
 - Set Category to Custom
 - Set Table Name to (none)
 - Set Action Name to the Custom Trigger's Name
- Complete & publish your Power Automate Flow



How to Trigger Power Automate from a Marketing Interaction: Part 3

- Navigate to Customer Insights – Journeys > Journeys
- Create a New Journey or edit an existing Journey
(In this example, we will email a Sales Rep using Power Automate when a lead clicks a link in an email)
- Add the 'Activate a Custom Trigger' Tile where you want to call Power Automate
- Select your Custom Trigger's Name
- Map the Attributes you want to pass to Power Automate
- Publish & test



Live Demo

Call Power Automate from
a Marketing Interaction



Key Takeaways & Resources

- Dynamics 365 Customer Insights is
 - Marketing Automation with CI-Journeys
 - Data Unification with CI-Data
- To surface Unified Data out-of-the-box
 - Do not select an Azure Data Lake as your CI storage
 - Connect to your Dataverse
 - Unify Contacts & make ContactID your Primary Key
 - Utilize the Customer Contact Card Add-in (preview) for Measures & Insights
 - Use D365 Forms for CustomerProfile data
- To surface Unified Data in reports
 - Use the Customer Insights connector (preview) in Power BI
- To trigger Power Automate from Marketing Behavior
 - Create a Custom Trigger, create a Flow using When An Action is Performed, then select the Custom Trigger's name from the Action Name field. Use the Activate a Custom Trigger tile in the Journey where you want to call your Power Automate Flow.

Key Takeaways & Resources

- Dynamics 365 Customer Insights pricing
<https://www.microsoft.com/en-us/dynamics-365/products/customer-insights/pricing>
- Dynamics 365 Customer Insights documentation
<https://learn.microsoft.com/en-us/dynamics365/customer-insights/>
- How to Setup Dynamics 365 Customer Insights – Data
<https://learn.microsoft.com/en-us/dynamics365/customer-insights/data/get-started>
- Power Query Connectors for Connecting Data in CI-D
<https://learn.microsoft.com/en-us/power-query/connectors/>
- Customer Insights Customer Contact Card Add-in (preview)
<https://learn.microsoft.com/en-us/dynamics365/customer-insights/data/customer-card-add-in>
- Customer Insights Connector for Power BI (preview)
<https://learn.microsoft.com/en-us/dynamics365/customer-insights/data/export-power-bi>
- How to Call Power Automate from CI-Journeys
<https://learn.microsoft.com/en-us/dynamics365/customer-insights/journeys/real-time-marketing-custom-actions>



What's Next

From Connected Systems to Connected Agents

Agents turn your connected foundation into “digital labor”—they can reason over your data, take action in your tools, and escalate to humans when needed.

What we mean by “connected agents”

- Agents are AI systems that automate and execute business processes alongside (or on behalf of) your teams.
- They go beyond “chat” to take actions, follow workflows, and (in advanced cases) operate more autonomously with guardrails.
- In this ecosystem, you'll have **specialists** (Sales, Marketing, Insights) that collaborate like a digital team.

Where agents live (in your stack)

- **Dynamics 365 Sales Agents** handle sales motions (e.g., qualification/research/close behaviors) inside Sales.
- **Customer Insights - Journeys Copilot** accelerates journey creation, segmentation, and email creation directly in CJJ.
- **Copilot Studio** is the hub to build/extend agents, connect knowledge + tools, and publish them where users work.

How they connect (the “wiring”)

- **Shared data foundation:** Unified profiles + Dataverse-connected apps mean agents act on consistent customer context.
- **Orchestration & automation:** Agent flows/workflows automate tasks and integrate apps/services—triggered by users, events, schedules, or other agents.
- **Measurement loop:** Power BI turns activity into visibility so you can monitor adoption + impact and continuously optimize.

So what?

- **Speed:** Agents execute the repetitive steps so humans focus on judgment + relationships.
- **Consistency:** Standardized workflows + governed prompts reduce variation and rework.
- **Scale:** You can scale pipeline and engagement without linear headcount growth—by adding digital capacity.



Key Takeaways & Resources

Looking for assistance?

PLATFORM SELECTION	IMPLEMENTATION	STRATEGY & REPORTING	AGENTIC MARKETING
4-6 Weeks Starting at \$70K	12-18 Weeks Starting at \$150K	6-8 Weeks Starting at \$70K	14-16 Weeks Starting at \$195K
<ul style="list-style-type: none">• Independent platform evaluation and comparison• Right-fit recommendation grounded in data and use cases• Clear roadmap to value, regardless of starting point	<ul style="list-style-type: none">• Accelerated path from platform to production• Trusted delivery of unified data and connected journeys• Built right the first time, with scalability in mind	<ul style="list-style-type: none">• Turn data into measurable marketing impact• Prove ROI with clear KPIs and executive visibility• Enable smarter decisions with actionable insights	<ul style="list-style-type: none">• Copilot-powered agents that orchestrate marketing work• Faster, consistent execution with built-in governance• Goal-driven automation across campaigns, content, and events• Human-in-control AI with brand, compliance, and approval guardrails



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<https://www2.perficient.com/prft/dynamicscon-2026>

Bonus Slides



How to Connect CIJ to CID

- Pre-requisite: CID is installed & connected to the same dataverse
- Login to Customer Insights – Journeys
- Navigate to **Settings** (lower left corner)
 - Navigate to **Customer Insights connector** (last item in left-hand nav)
 - Click **connect**
(The process will take time, you can navigate away and come back)



How to Disconnect CIJ from CID

- Navigate to make.powerapps.com
- **Select** the proper environment (upper right corner)
- Navigate to **Tables** and select **ALL** to see all tables
- Open the **msdynmkt_configuration** table
 - open the **CXPConfig** row, and change **Customer Insights Status** from **Configured** to **NotConfigured**
- Then go to **Solutions** and select **ALL** to see all solutions
 - Delete these solutions if they are present (each solution you delete will take several minutes)
 - DynamicsMKT_AttachCIApplicationUser
 - DynamicsMKT_ConsentAttachCI (Dynamics Marketing Consent For Customer Insights) and
 - DynamicsMKT_OrchestrationEngineAttachCI
- Verify it worked:
 - Navigate back to **Tables** and select **ALL** to see all tables
 - Open the **msdynmkt_configuration** table
 - open the **CXPConfig** row, confirm that **Customer Insights Status** remains **NotConfigured**
 - Dependency removal can take a couple of hours to take effect



How to Remove CID

- Prerequisites:
 - Be sure to **disconnect CID from CIJ FIRST** before removing CID
 - Customer Insights - Data admin role, Power Platform environment admin role, and no active exports or downstream dependencies that rely on Customer Insights - Data output
- Navigate to your instance of CID
- Confirm your environment is correct (upper right corner)
- Click the Environment (upper right corner)
- Click the ellipses (3 dots next to your environment name)
 - Click Delete
 - Enter the name of your environment & click delete/ok

