



QUALIFICATION FILE-OEM

Microsoft Dynamics 365 Customer Insights (Journeys) Functional Consultant

☒ Short Term Training (STT) ☐ Long Term Training (LTT) ☐ Apprenticeship

☒ Upskilling ☐ Dual/Flexi Qualification ☐ For ToT ☐ For ToA

☒ General ☐ Multi-Skill (MS) ☐ Cross-Sectoral (CS) ☐ Future Skills ☒ Original Equipment Manufacturer (OEM)

NCrF/NSQF Level: 6

Submitted By:

Microsoft Corporation India Pvt. Ltd.

DLF Downtown, Level 8, Block 2

DLF Phase - 3, Sector - 25A

Gurugram 122002

Table of Contents

Section 1: Basic Details 3

Section 2: Module Summary 6

 NOS/s of Qualifications.....**Error! Bookmark not defined.**

 Mandatory NOS/s:**Error! Bookmark not defined.**

 Elective NOS/s:**Error! Bookmark not defined.**

 Optional NOS/s:**Error! Bookmark not defined.**

 Assessment - Minimum Qualifying Percentage.....**Error! Bookmark not defined.**

Section 3: Training Related.....**Error! Bookmark not defined.**

Section 4: Assessment Related.....**Error! Bookmark not defined.**

Section 5: Evidence of the need for the Qualification.....**Error! Bookmark not defined.**

Section 6: Annexure & Supporting Documents Check List.....**Error! Bookmark not defined.**

 Annexure: Evidence of Level**Error! Bookmark not defined.**

 Annexure: Tools and Equipment (Lab Set-Up)**Error! Bookmark not defined.**

 Annexure: Industry Validations Summary**Error! Bookmark not defined.**

 Annexure: Training & Employment Details**Error! Bookmark not defined.**

 Annexure: Blended Learning**Error! Bookmark not defined.**

 Annexure: Detailed Assessment Criteria**Error! Bookmark not defined.**

 Annexure: Assessment Strategy**Error! Bookmark not defined.**

 Annexure: Acronym and Glossary**Error! Bookmark not defined.**

Section 1: Basic Details

1.	Qualification Name	Microsoft Dynamics 365 Customer Insights (Journeys) Functional Consultant								
2.	Sector/s	IT/ITeS								
3.	Type of Qualification: ☐ New ☐ Revised ☐ Has Electives/Options ☒ OEM	NQR Code & version of existing/previous qualification: <i>(change to previous, once approved)</i> NA		Qualification Name of existing/previous version: NA						
4.	a. OEM Name b. Qualification Name <i>(Wherever applicable)</i>	a. Microsoft b. Microsoft Dynamics 365 Customer Insights (Journeys) Functional Consultant								
5.	National Qualification Register (NQR) Code &Version <i>(Will be issued after NSQC approval)</i>	NM-06-IT-04301-2025-V1-MCRSFT	6. NCrF/NSQF Level: 6							
7.	Award (Certificate/Diploma/Advance Diploma/ Any Other <i>(Wherever applicable specify multiple entry/exits also & provide details in annexure)</i>)	Certificate								
8.	Brief Description of the Qualification	As a Customer Insights (Journeys) Functional Consultant, you will analyze business needs, configure Dynamics 365 Customer Insights, customize solutions, and provide training to ensure effective system adoption and utilization.								
9.	Eligibility Criteria for Entry for Student/Trainee/Learner/Employee	a. Entry Qualification & Relevant Experience: <table border="1"> <thead> <tr> <th>S. No.</th> <th>Academic/Skill Qualification (with Specialization - if applicable)</th> <th>Required Experience (with Specialization - if applicable)</th> </tr> </thead> <tbody> <tr> <td></td> <td> 1.Any degree with ability to analyze and solve business problems using technology. 2.Any basic degree with understanding of basic IT concepts and terminology. 3.Pursuing first year of 2-year PG program after completing 3-year UG degree with intermediate knowledge of Azure. 4. Pursuing 1-year PG diploma after 3-year UG degree with intermediate knowledge of Azure. 5. Completed 4th year UG (in case of 4-year UG) with intermediate knowledge of Azure. 6. Pursuing 4th year UG (in case of 4-year UG) and continuing education </td> <td>NA</td> </tr> </tbody> </table>			S. No.	Academic/Skill Qualification (with Specialization - if applicable)	Required Experience (with Specialization - if applicable)		1.Any degree with ability to analyze and solve business problems using technology. 2.Any basic degree with understanding of basic IT concepts and terminology. 3.Pursuing first year of 2-year PG program after completing 3-year UG degree with intermediate knowledge of Azure. 4. Pursuing 1-year PG diploma after 3-year UG degree with intermediate knowledge of Azure. 5. Completed 4th year UG (in case of 4-year UG) with intermediate knowledge of Azure. 6. Pursuing 4th year UG (in case of 4-year UG) and continuing education	NA
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				with intermediate knowledge of Azure. 5. Completed 3-Year UG Degree (1 year relevant experience in Azure .																				
		b. Age: NA																						
10.	Credits Assigned to this Qualification, Subject to Assessment (as per National Credit Framework (NCrF))	1.	11. Common Cost Norm Category (I/II/III) (wherever applicable):																					
12.	Any Licensing requirements for Undertaking Training on This Qualification (wherever applicable)	Yes, Microsoft 365																						
13.	Training Duration by Modes of Training Delivery (Specify Total Duration as per selected training delivery modes and as per requirement of the qualification)	☐ Offline ☒ Online ☐ Blended <table border="1"> <thead> <tr> <th>Training Delivery Modes</th><th>Theory (Hours)</th><th>Practical (Hours)</th><th>OJT Mandatory (Hours)</th><th>OJT Recommended (Hours)</th><th>Total (Hours)</th></tr> </thead> <tbody> <tr> <td>Classroom (offline)</td><td></td><td></td><td></td><td></td><td></td></tr> <tr> <td>Online</td><td>20</td><td>10</td><td></td><td></td><td>30</td></tr> </tbody> </table> (Refer Blended Learning Annexure for details)					Training Delivery Modes	Theory (Hours)	Practical (Hours)	OJT Mandatory (Hours)	OJT Recommended (Hours)	Total (Hours)	Classroom (offline)						Online	20	10			30
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14.	Aligned to NCO/ISCO Code/s (if no code is available mention the same)																							
15.	Progression path after attaining the qualification (Please show Professional and Academic progression)	Career Progression: Microsoft Dynamics 365 Customer Insight (journey) Functional Consultant → Customer Engagement Specialist→ Consulting & Leadership roles→ Solution Architect																						
16.	Other Indian languages in which the Qualification & Model Curriculum are being submitted																							
17.	Is similar Qualification(s) available on NQR-if yes, justification for this qualification	☐ Yes ☐ No URLs of similar Qualifications:																						
18.	Is the Job Role Amenable to Persons with Disability	☒ Yes ☐ No If "Yes", specify the applicable type of Disability: Physical Disability. Hearing and speech-impaired																						
19.	How Participation of Women will be Encouraged	Organisations are increasingly prioritising gender diversity and actively recruiting women from rural India to meet ESG compliance standards. Tailored, industry-relevant programs can equip women with the skills and confidence needed to succeed in multinational companies.																						

20.	Are Greening/ Environment Sustainability Aspects Covered (Specify the NOS/Module which covers it)	☐ Yes ☐ No	
21.	Is Qualification Suitable to be Offered in Schools/Colleges	Schools ☒ Yes ☐ No Colleges ☒ Yes ☐ No	
22.	Name and Contact Details of Submitting / Awarding Body SPOC (In case of CS or MS, provide details of both Lead AB & Supporting ABs)	Name: Manju Dhasmana Contact No.: +91 (124) 6561069(India) Email: manjud@microsoft.com Name: Kishore Kumar Thangavelu Contact No: +91 (124) 6561069(India) Email: Kishore.Thangavelu@microsoft.com Name: Jennifer Filarski Email: jennifb@microsoft.com Contact No.: 425-704-7872 (USA) Website: https://www.microsoft.com/en-us/	
23.	Final Approval Date by NSQC: 8 th May,2025	24. Validity Duration: 3 Years	25. Next Review Date:6 th May,2025

Section 2: Training Related

1.	Trainer's Qualification and experience in the relevant sector (in years) <i>(as per NCVET guidelines)</i>	A minimum of 3 years' experience in Microsoft Dynamics 365 Customer Engagement or in a related Field
2.	Master Trainer's Qualification and experience in the relevant sector (in years) <i>(as per NCVET guidelines)</i>	A minimum of 5 years' experience in Microsoft Dynamics 365 Customer Engagement or in related Field Equivalent professional experience will also be considered
3.	Tools and Equipment Required for the Training	☐ Yes ☐ No <i>(If "Yes", details to be provided in Annexure)</i> Laptop with Windows 10 or 11 Enterprise or Pro Software to perform Labs
4.	In Case of Revised NOS, details of Any Upskilling Required for Trainer	NA

Section 3: Assessment Related

1.	Assessor's Qualification and experience in relevant sector (in years) <i>(as per NCVET guidelines)</i>	Graduate with at least 3 years' experience in MS Dynamics 365 Customer engagement or equivalent.
2.	Proctor's Qualification and experience in relevant sector (in years) <i>(as per NCVET guidelines), (wherever applicable)</i>	Graduate with at least 3 years' experience in MS Dynamics 365 Customer engagement or equivalent.
3.	Lead Assessor's/Proctor's Qualification and experience in relevant sector (in years) <i>(as per NCVET guidelines)</i>	Educational Qualification: Diploma in Computers/ Electronics / Electrical Engg/ B.E/ B.Tech /MBA With a minimum of 3 years MS Dynamics 365 Customer engagement or equivalent.
4.	Assessment Mode <i>(Specify the assessment mode)</i>	Online Home/Office and at Registered Test Centers offline both options are available.
5.	Tools and Equipment Required for Assessment	☒ Same as for training ☐ Yes ☐ No <i>(details to be provided in Annexure-if it is different for Assessment)</i>

Section 4: Evidence of the Need for the Standalone NOS

Provide Annexure/Supporting documents name.

1.	Government /Industry initiatives/ requirement (Yes/No):Industry Initiative
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2.	Number of Industry validation provided: NA
3.	Estimated number of people to be trained: Approx. 15,000 learners to be trained in the year 2025
4.	Evidence of Concurrence/Consultation with Line/State Departments (In case of regulated sectors): (Yes/No): NA as per OEM Guidelines

Section 5: Annexure & Supporting Documents Check List

Specify Annexure Name / Supporting document file name

1.	Annexure: NCrF/NSQF level justification based on NCrF/NSQF descriptors <i>(Mandatory)</i>	Annexure: Evidence of Level.
2.	Annexure: List of tools and equipment relevant for NOS <i>(Mandatory, except in case of online course)</i>	Annexure: Tools and Equipment
3.	Annexure: Performance and Assessment Criteria <i>(Mandatory)</i>	Annexure: Performance and Assessment Criteria
4.	Annexure: Assessment Strategy <i>(Mandatory)</i>	Annexure: Assessment Strategy
5.	Annexure: Blended Learning <i>(Mandatory, in case selected Mode of delivery is Blended Learning)</i>	Annexure: Blended Learning
6.	Annexure: Acronym and Glossary <i>(Optional)</i>	Annexure: Acronym and Glossary
7.	Annexure/Supporting Document: Standalone NOS- Performance Criteria Details Annexure/Document with PC-wise detailing as per NOS format (Mandatory- Public view)	Annexure: Standalone NOS Performance Criteria
8.	Supporting Document: Model Curriculum <i>(Mandatory – Public view)</i>	Model Curriculum –Microsoft Dynamics 365 Customer Insights (Journeys) Functional Consultant

Annexure: Evidence of Level

NCrF/NSQF Level Descriptors	Key requirements of the job role/ outcome of the qualification	How the job role/ outcomes relate to the NCrF/NSQF level descriptor	NCrF/NSQF Level
Professional Theoretical Knowledge/Process	MB-220 Customer Insights (Journeys) Functional Consultant is responsible for optimizing customer engagement processes within Dynamics 365. Their duties include configuring and customizing the Customer Insights module, ensuring data integrity and security, and providing actionable insights through advanced reporting and analytics. They also play a crucial role in training users and supporting the adoption of new customer engagement tools and features.	MB-220 certification equips professionals with advanced skills in managing and optimizing customer engagement processes within Dynamics 365 Customer Insights (Journeys). It validates their expertise in configuring and customizing the Customer Insights module, ensuring data integrity and security, and providing actionable insights through advanced reporting and analytics. This certification enhances career prospects by opening doors to Customer Insights Functional Consultant, CRM Specialist, or Dynamics 365 Consultant roles.	6
Professional and Technical Skills/ Expertise/ Professional Knowledge	MB-220 signifies a comprehensive skill set in managing customer engagement processes within Dynamics 365 Customer Insights	As an MB-220 Customer Insights (Journeys) Functional Consultant, responsibilities typically include:	6

	(Journeys) environments. Professionals with this certification excel in configuring and customizing the Customer Insights module, ensuring data integrity and security, and providing actionable insights through advanced reporting and analytics. They possess adept troubleshooting abilities to swiftly resolve technical issues and support user adoption of new customer engagement tools and features. This certification enhances career prospects by opening doors to roles such as Customer Insights Functional Consultant, CRM Specialist, or Dynamics 365 Consultant.	• Customer Insights Management: Configuring, customizing, and maintaining the Customer Insights module within Dynamics 365 to enhance customer engagement. • Data Integrity and Security: Ensuring the accuracy and security of customer data through regular audits and implementing best practices. • User Training and Support: Providing training and ongoing support to users to enhance their proficiency with Dynamics 365 Customer Insights tools and features. • Performance Monitoring: Monitoring customer engagement metrics to identify trends and areas for improvement, ensuring optimal utilization of resources and tools.	
Employment Readiness & Entrepreneurship Skills & Mind-set/Professional Skill	Certification validates expertise sought by employers for roles such as Customer Insights Functional Consultant, CRM Specialist, and Dynamics	The MB-220 qualification signifies proficiency in optimizing customer engagement processes through several key professional skills: • Customer Data Management: Expertise in	6

	365 Consultant. It demonstrates proficiency in configuring, customizing, and securing the Customer Insights module within Dynamics 365, enhancing credibility and trustworthiness among employers and peers.	implementing and managing customer data controls, including data integration and segmentation, to ensure accurate and actionable insights. • Customer Journey Orchestration: Knowledge of designing and managing customer journeys, including creating personalized experiences and automating engagement workflows. • Data Protection: Skills in implementing data protection measures, including encryption and compliance with data privacy regulations, to safeguard customer information and ensure business continuity.	
Broad Learning Outcomes/Core Skill	The broad learning outcomes of MB-220, focusing on advanced customer engagement management within Dynamics 365 Customer Insights (Journeys), include:	Here are the responsible job roles of an MB-220 Customer Insights (Journeys) Functional Consultant: Integrating Customer Data: Integrating customer data from various sources into Dynamics 365 Customer Insights for a unified view.	6

	Proficiency in implementing robust data management measures to protect and utilize customer data effectively within Dynamics 365 environments. • Capability to design and implement strategic customer engagement processes to meet organizational goals and enhance customer experiences.	Managing Customer Journeys: Designing and managing customer journeys to enhance engagement and personalize experiences. • Handling Data Segmentation: Managing and maintaining customer data segmentation and analysis tasks to derive actionable insights.	
Responsibility	Responsibilities of an MB-220 Customer Insights (Journeys) Functional Consultant include: • Integrating Customer Data • Managing Customer Journeys • Handling Data Segmentation • Ensuring Data Security • Performance Monitoring • Collaboration	As a Dynamics 365 Customer Insights (Journeys) Functional Consultant, your responsibilities include integrating customer data from various sources into Dynamics 365 Customer Insights, managing customer journeys to enhance engagement, and overseeing data segmentation and analysis tasks. You collaborate closely with CRM specialists, marketing teams, IT administrators, and business analysts to ensure seamless integration, efficient operations, and optimal performance of customer engagement processes.	6

Annexure: Tools and Equipment (lab set-up)

List of Tools and Equipment

Batch Size:NA, as it is on a Cloud-based lab

S. No.	Tool / Equipment Name	Specification	Quantity for specified Batch size
1	Computer with Internet	Windows 10 or 11 Pro /Enterprise	One per learner
2	LODS Key	Microsoft 365 Dynamics	One per learner
3	Installed Browser	Latest Google Chrome/Microsoft Edge Browser	Installed on the computer of the learner
4	Internet	Stable internet connection with minimum 40 mbps speed	Internet access for the learners

Classroom Aids

The program is virtual classroom enabled.

The aids required to conduct sessions in the classroom / virtual are:

1. MS Teams (for virtual) with Wi-Fi Connectivity
2. Computer system (1 per learner), LODs key for performing Labs.

Annexure: Industry Validations Summary

Not Applicable - vide Guidelines for Creditisation of Skilling and Training Courses
and Qualifications of MNCs and Leading Indian Enterprises

annexure: Training Details

Training Projections:

Year	Estimated Training # of Total Candidates	Estimated training # of Women	Estimated training # of People with Disability

Data to be provided year-wise for next 3 years.

Annexure: Blended Learning

Blended Learning Estimated Ratio & Recommended Tools:

S. No.	Select the Components of the NOS	List Recommended Tools – for all Selected Components	Offline: Online Ratio
1	☒ Theory/ Lectures - Imparting theoretical and conceptual knowledge	MS Learn Links of the course will be provided, Internet Connection, Computers	0:100
2	☒ Imparting Soft Skills, Life Skills and Employability Skills /Mentorship to Learners		
3	☒ Showing Practical Demonstrations to the learners	LODS Key is required, Computer, Internet Connection, Projector	30:70
4	☒ Imparting Practical Hands-on Skills/ Lab Work/ workshop/ shop floor training	LODS Key is required, Computer, Internet Connection, Projector	30:70
5	☒ Tutorials/ Assignments/ Drill/ Practice		

6	☒ Proctored Monitoring/ Assessment/ Evaluation/ Examinations	Proctored Exam, Computer with good Camera, Microphone, Internet Connectivity and One Vue support	0:100
7	☐ On the Job Training (OJT)/ Project Work Internship/ Candidate Training	MS Learn Links of the course will be provided, Internet Connection, Computers	0:100

Annexure: Standalone NOS- Performance Criteria details

1. Description:

This course aims to certify individuals as

Microsoft Certified: Dynamics 365 Customer Insights (Journeys) Functional Consultant. The qualification is designed to prepare professionals to configure and manage customer engagement processes within Dynamics 365 Customer Insights. As a Customer Insights (Journeys) Functional Consultant, you will be responsible for integrating customer data from various sources, managing customer journeys, handling data segmentation and analysis, ensuring data security, monitoring performance, and collaborating effectively with various business and IT professionals.

2. Scope:

The scope covers the following:

- Integrating Customer Data from various sources into Dynamics 365 Customer Insights.
- Managing Customer Journeys to enhance engagement and personalize experiences.
- Handling Data Segmentation and Analysis to derive actionable insights and improve customer engagement strategies.

3. Elements and Performance Criteria

To be competent, the user/individual on the job must be able to:

1. Learning Path -01: Configure Dynamics 365 Customer Insights – Journeys (5 hours)

- Set up and manage Dynamics 365 Customer Insights - Journeys
- Configure marketing settings
- Review email settings and best practices
- Manage assets and content settings

Learning Path -02: Manage your audience in Dynamics 365 Customer Insights – Journeys (5 hours)

- Get to know your audience
- Manage leads and lead scoring

Learning Path -03: Create emails, forms, text messages, and push notifications. (5 hours)

- Create emails
- Create forms
- Create text messages and push notifications

Learning Path -04: Create segments and journeys (6 hours)

- Create and manage segments
- Create a journey and work with triggers
- Add elements to a journey
- Publish journeys
- Extend real-time capabilities with Dataverse triggers

Learning Path -05: Manage events (5 hours)

- Create an on-site event
- Create a webinar event
- Promote and manage events

Learning Path -06: Create surveys with Dynamics 365 Customer Voice(4 hours)

- Create a survey project
- Create surveys with Dynamics 365 Customer Voice
- Send Dynamics 365 Customer Voice surveys

Learning Path -07: Analyze insights with Dynamics 365 Customer Insights – Journeys (2 hours)

- Evaluate marketing initiatives with analytics
- View aggregate analytics

Annexure: Assessment Criteria

Detailed PC-wise assessment criteria and assessment marks for the NOS are as follows:

S. No.	Assessment Criteria for Performance Criteria	Percentage
1.	Configure Dynamics 365 Customer Insights - Journeys	(30–35%)
2.	Manage your audience in Dynamics 365 Customer Insights - Journeys	(10–15%)

3.	Create emails, forms, text messages, and push notifications.	(15–20%)
4.	Create segments and journeys, Manage events	(15–20%)
5.	Create surveys with Dynamics 365 Customer Voice Analyze insights	(15–20%)
Total Marks		1000

Note: Based on Release Changes the Percentages vary. MS Learn Links for the respective course will be able to provide the respective percentages. All technical exam scores are reported on a scale of 1 to 1,000. A passing score is 700 or greater. As this is a scaled score, it may not equal 70% of the points. A passing score is based on the knowledge and skills needed to demonstrate competence as well as the difficulty of the questions.

- Exam Duration and Number of Questions: 100 minutes to answer 40 to 60 questions
- Format of the questions: multiple-choice, true/false, drag and drop, list builds, and case studies.
- Delivery method: Pearson VUE center or online proctored exam.

Annexure: Assessment Strategy

This section includes the processes involved in identifying, gathering, and interpreting information to evaluate the Candidate on the required competencies of the program.

Assessment System Overview:

- As its Online Proctored exam. It's important to the test the computer with Good Camera, microphone, and internet connection.
- Need to check OnVUE software id working properly as firewall can block them.
- Need a valid Govt recognized id and a closed and quite room for taking up exam.
- Explore the exam sandbox to learn more about the exam UI and the different types of questions you may encounter. Before taking the exam.

2. Testing Environment:

- Candidates register for the exam and schedule a date and time for taking up the exam.
- Assessment agencies send the assessment confirmation to participants via email.
- Assessment agency deploys the Microsoft Certification on Power Platform Fundamentals on successful completion of the certificate.

- Multiple-choice, true/false, drag and drop, list builds, and case studies are given for assessment.

3. Assessment Quality Assurance levels/Framework:

- Question bank is created by the Subject Matter Experts (SME) are verified by the other SME
- Questions are mapped to the specified assessment criteria

4. Types of evidence or evidence-gathering protocol:

- Need a valid Govt identification card.

5. Method of verification or validation:

- Proctor can anytime ask you to rotate the system and cancel the exam if found suspicious.
- Sign into your Microsoft Learn profile. In the photo avatar drop-down menu, choose Profile and then choose Certifications inside the profile menu, to check the status of the exam

6. Method for assessment documentation, archiving, and access

- Sign into your Microsoft Learn profile. In the photo avatar drop-down menu, choose Profile and then choose Certifications inside the profile menu, to check the status of the exam

Annexure: Acronym and Glossary

Acronym

Acronym	Description
AA	Assessment Agency
AB	Awarding Body
NCrF	National Credit Framework
NOS	National Occupational Standard(s)
NQR	National Qualification Register
NSQF	National Skills Qualifications Framework

Glossary

Term	Description
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National Occupational Standards (NOS)	NOS define the measurable performance outcomes required from an individual engaged in a particular task. They list down what an individual performing that task should know and also do.
Qualification	A formal outcome of an assessment and validation process which is obtained when a competent body determines that an individual has achieved learning outcomes to given standards
Qualification File	A Qualification File is a template designed to capture necessary information of a Qualification from the perspective of NSQF compliance. The Qualification File will be normally submitted by the awarding body for the qualification.
Sector	A grouping of professional activities on the basis of their main economic function, product, service or technology.