



## Microsoft Dynamics 365 Customer Insights (Journeys) Functional Consultant

**Course MB-220T00: 4 days; Instructor-Led**

### Introduction

This course will review the Dynamics 365 Customer Insights - Journeys application configuration needed to drive business growth. It will also dive into lead management, marketing forms and pages, segmentation, real-time marketing, and email marketing messages. All these pieces are tied together through interactive customer journey design, including event and survey configuration.

### Audience

This course is designed for IT or marketing professionals who want to learn how to leverage Dynamics 365 Customer Insights - Journeys for their organization.

**Job role:** Functional Consultant

**Preparation for exam:** [MB-220](#)

### Prerequisites

Knowledge of the Dynamics 365 platform and an understanding of basic marketing principles. Power Platform experience, especially in model-driven applications, is also recommended. Dynamics 365 Customer Insights - Data experience is encouraged, either as a prerequisite or as an opportunity for further learning.

### Course Outline

#### Module 1: Set up and manage Dynamics 365 Customer Insights - Journeys

Are you interested in marketing applications? This module explains how to sign up for a free trial or purchase Dynamics 365 Customer Insights - Journeys.

In this module, you will:

- Sign up for a free trial of Dynamics 365 Customer Insights - Journeys
- Purchase and set up Dynamics 365 Customer Insights - Journeys
- Manage marketing environments
- Keep the marketing app up-to-date
- Uninstall Dynamics 365 Customer Insights - Journeys services

#### Lessons

- Introduction to Dynamics 365 Customer Insights - Journeys
- Start with a trial of Dynamics 365 Customer Insights - Journeys
- Purchase and set up Dynamics 365 Customer Insights - Journeys
- Integrate Customer Insights - Journeys with a CMS system or Microsoft Power Pages
- Re-run the Marketing setup wizard
- Manage environments
- Keep the app up to date
- Uninstall the Marketing services

#### Module 2: Advanced configuration for Dynamics 365 Customer Insights - Journeys

Administrators use settings to fine-tune application behavior, set marketing defaults, check quotas, manage core marketing settings, and more.

In this module, you will:

- Access the settings area within Dynamics 365 Customer Insights - Journeys
- View versions, quota limits, and usage limits.
- Update default settings for landing pages, emails, customer journeys, and more.
- Manage customer engagement settings including compliance settings, audience configuration, push notification and SMS provider setup, social media account management, and more.
- Turn on the Microsoft Teams collaboration and chat features for use within the app.
- Set up the connections to webinar providers and manage default settings for events.
- Define how form submissions are matched to existing contacts or leads, configure lead scoring, and enable the Microsoft Dynamics 365 Connector for LinkedIn Lead Gen for your environment.
- Select which entities to sync to Dynamics 365 Customer Insights - Journeys, connect your Dynamics 365 Customer Insights - Journeys environment to Microsoft Azure Blob Storage, and connect Customer Insights to your Dynamics 365 Customer Insights - Journeys environment.

### Lessons

- Introduction
- Overview
- Email marketing
- Customer engagement
- Collaboration
- Event management
- Lead management
- Data management
- Customer Insights connector
- Customize Dynamics 365 Customer Insights - Journeys

## **Module 3: Review domain authentication, email best practices, and GDPR in Dynamics 365 Customer Insights -**

### **Journeys**

Learn about domain authentication, email best practices, and GDPR.

In this module, you will:

- Authenticate your domain in Dynamics 365 Customer Insights - Journeys
- Build and protect your send reputation
- Prepare Dynamics 365 for GDPR compliance

### Lessons

- Introduction
- Domain authentication
- Email best practices
- Data protection and privacy and personal data compliance

## **Module 4: Manage assets and content settings in Dynamics 365 Customer Insights - Journeys**

Learn about managing assets, keywords, content blocks, and content settings in Dynamics 365 Customer Insights - Journeys.

In this module, you will:

- Upload images to the file library and use images in marketing content.
- Create keywords and associate them to images.
- Incorporate content block elements in marketing content.
- Review, update, and create content settings.

### Lessons

- Introduction
- Upload images
- Manage keywords

- Create reusable content blocks
- Configure content settings

### **Module 5: Manage customers in Dynamics 365 Customer Insights - Journeys**

This module covers the basics of contact, accounts, and lead management within Dynamics 365 Customer Insights - Journeys.

In this module, you will:

- Manage contacts and accounts in Dynamics 365 Customer Insights - Journeys.
- Identify the core concepts of account-based marketing.
- Score and qualify leads.

#### **Lessons**

- Introduction
- Manage contacts
- Manage accounts
- Account-based marketing
- Manage leads
- Score and qualify leads

### **Module 6: Manage forms and pages in Dynamics 365 Customer Insights - Journeys**

Learn how to manage forms and marketing pages in Dynamics 365 Customer Insights - Journeys.

In this module, you will:

- Create and publish marketing forms.
- Add forms to Dynamics 365 Customer Insights - Journeys pages and externally hosted pages.
- Set up form captures.
- Build marketing form and marketing page templates.

#### **Lessons**

- Introduction
- Create a marketing form
- Add a form to a marketing page
- Embed forms on external websites
- Create a marketing form template
- Create a marketing page
- Set up marketing page personalization
- Create a marketing page template
- Exercise - Create a marketing form and marketing page

### **Module 7: Manage emails, segments, and journeys in Dynamics 365 Customer Insights - Journeys**

This module covers managing marketing emails, segments, customer journeys, and A/B testing in outbound marketing.

In this module, you will:

- Create and publish a marketing email.
- Construct segments within Dynamics 365 Customer Insights - Journeys.
- Leverage segments created within Customer Insights.
- Design and publish a customer journey.
- Run an A/B test in outbound marketing.
- Build marketing email, segment, and customer journey templates.

#### **Lessons**

- Introduction
- Create a marketing email

- Deliver a marketing email with send now
- A/B testing for email marketing
- Create an email template
- Create and manage segments
- Create a segment template
- Market to Dynamics 365 segments on LinkedIn
- Use segments from Dynamics 365 Customer Insights
- Create a customer journey
- Run A/B testing from a customer journey
- Generate dynamic behavioral segments from customer journey results
- Create a customer journey template
- Exercise - Create a customer journey

### **Module 8: Manage subscription centers and double opt-in in Dynamics 365 Marketing**

Learn about managing subscription centers and double opt-in in Dynamics 365 Marketing.

In this module, you will:

- Create a subscription list.
- Build a subscription center form.
- Design a subscription center marketing page.
- Identify a subscription center in content settings.
- Select a content settings record in a customer journey.

#### **Lessons**

- Introduction
- Manage subscription centers
- Set up global double opt-in
- Set up double opt-in on a per form basis

### **Module 9: Manage subscription centers and double opt-in in Dynamics 365 Customer Insights - Journeys**

Learn about managing subscription centers and double opt-in in Dynamics 365 Customer Insights - Journeys.

In this module, you will:

- Create a subscription list.
- Build a subscription center form.
- Design a subscription center marketing page.
- Identify a subscription center in content settings.
- Select a content settings record in a customer journey.

#### **Lessons**

- Introduction
- Manage subscription centers
- Set up global double opt-in
- Set up double opt-in on a per form basis

### **Module 10: Manage website visits, redirect URLs, and social postings in Dynamics 365 Customer Insights -**

#### **Journeys**

This module discusses managing website visits, redirect URLs, and social postings in Dynamics 365 Customer Insights - Journeys.

In this module, you will:

- Monitor website visits.
- Track visitors to your marketing pages.
- Create redirect URLs.
- Schedule and post messages on social media.

**Lessons**

- Introduction
- Monitor website visits and link clicks
- Marketing on social media

**Module 11: Create an on-site event in Dynamics 365 Customer Insights - Journeys**

Do you manage and set up events? This module explains the process of creating an on-site event and managing the event details including sessions, speakers, sponsorships, registration, passes, and more within Dynamics 365 Customer Insights - Journeys.

In this module, you will:

- Create an in-person event in Dynamics 365 Customer Insights - Journeys.
- Manage sessions, speakers, and sponsorships.
- Configure registration options and setup event passes.
- Capture additional information about the event including financial details and event team members.
- Customize the calendar content for the event.
- Manage event logistics.
- Publish the event and view the event website.

**Lessons**

- Introduction
- Event website overview
- Review the event business process
- Create the event record
- Manage sessions, speakers, and sponsorships
- Configure registration options and set up event passes
- Record additional information about the event
- Manage event logistics
- Publish an event
- View the event website
- Exercise - Create an on-site event

**Module 12: Create a webinar event in Dynamics 365 Customer Insights - Journeys**

Do you need to create webinars? This module explains the process of creating a webinar event within Dynamics 365 Customer Insights - Journeys.

In this module, you will:

- Configure webinar settings for On24 and other third-party webinar providers.
- Create a webinar event using On24 or other third-party webinar providers.
- Create a webinar event using Microsoft Teams.
- Build the registration form for a virtual event.

**Lessons**

- Introduction
- Configure webinar settings
- Create a non-Teams webinar event
- Create a Microsoft Teams webinar event
- Build the event registration form

**Module 13: Promote events, manage registration and check-ins, and review results in Dynamics 365 Customer Insights - Journeys**

Learn how to promote events, manage registration and check-ins, and review results in Microsoft Dynamics 365 Customer Insights - Journeys.

In this module, you will:

- Introduction

- Configure webinar settings
- Create a non-Teams webinar event
- Create a Microsoft Teams webinar event
- Build the event registration form

#### Lessons

- Introduction
- Promote your events
- View and manage event registrations
- Book hotel rooms for staff, speakers, and guests
- View and manage event attendance
- Follow up after the event

#### **Module 14: Advanced event management features in Dynamics 365 Customer Insights - Journeys**

Create and manage new recurring events and event templates in Dynamics 365 Customer Insights - Journeys.

In this module, you will:

- Create and manage recurring events.
- Create an event template.

#### Lessons

- Introduction
- Create and manage recurring events
- Create an event template

#### **Module 15: Evaluate marketing initiatives with analytics in Dynamics 365 Customer Insights - Journeys**

Evaluate analytics and key performance indicators of marketing efforts in order to understand impact and what tactics work best for your target audience.

In this module, you will:

- Review and analyze results from Dynamics 365 Customer Insights - Journeys insights.

#### Lessons

- Introduction to Marketing insights
- Contact insights
- Lead insights
- Lead scoring insights
- Account insights
- Segment insights
- Customer journey insights
- Marketing email insights
- Marketing page and form insights
- Website insights
- Social insights
- Redirect insights

#### **Module 16: Review the marketing calendar in Dynamics 365 Customer Insights - Journeys**

Visualize marketing activities, view entities, and related activities and customize your marketing calendars.

In this module, you will:

- Review entity calendars
- Review form calendars
- Create and customize marketing calendars

#### Lessons

- Introduction
- Entity level calendars

- Form-level calendars
- Create and customize marketing calendars