



Microsoft Dynamics 365 Marketing

Course MB-220T00-A: 3 days; Instructor-Led

Introduction

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

At Course Completion

After completing this course, students will be able to:

- Identify platform components.
- Understand administrator options.
- Effectively model data.
- Build a basic model-driven or canvas application.
- Identify testing strategies and methodologies.
- Identify integration opportunities.

Audience

This course is designed for IT or marketing professionals who want to learn how to leverage Dynamics 365 for Marketing for businesses.

Prerequisites

Knowledge of the Dynamics 365 platform and an understanding of basic marketing principles.

Course Outline

Module 1: Marketing Application Configuration

In this module, you will learn about advanced settings, marketing content, templates and integrations in Dynamics 365 for Marketing.

Lessons

- Configure advanced settings
- Manage marketing content and templates
- Manage LinkedIn and Power BI integrations

After completing this module you will be able to:

- Configure advanced settings such as organization, business management, and content.
- Manage marketing content and templates.

Module 2: Leads

This module will review how to create, manage and score leads.

Lessons

- Create and manage leads
- Assess sales readiness

After completing this module you will be able to:

- Create and manage leads.
- Synchronize leads from LinkedIn.
- Assess sales readiness using lead scoring models.

Module 3: Marketing Forms and Pages

This module will cover how to create marketing forms and pages.

Lessons

- Create marketing forms
- Create marketing pages
- Manage internet marketing

After completing this module you will be able to:

- Create marketing forms and embed them on marketing pages.
- Create a marketing page.
- Preview, validate and go live with a marketing page.
- Create marketing form and page templates.

Module 4: Segments and Lists

This module will cover how to manage segments, subscription centers, lists and double opt-in.

Lessons

- Create and manage segments
- Create and manage subscription centers
- Double opt-in

After completing this module you will be able to:

- Configure static and dynamic segments.
- Create a subscription list.
- Set up a subscription center page.
- Set up and enable a double opt-in process.

Module 5: Marketing Emails

This module will cover how to create email messages in Dynamics 365 Marketing.

Lessons

- Create Email Message

After completing this module you will be able to:

- Create and design email messages.
- Preview, validate and go live with email messages.
- Save an email message as a template.

Module 6: Customer Journeys

This module will review the customer journey creation process.

Lessons

- Create customer journeys

After completing this module you will be able to:

- Create a customer journey from a template.
- Identify customer journey tiles and properties.
- Validate and go live with a customer journey.
- Create an account-based customer journey.
- Understand the marketing calendar features.

Module 7: Insights

This module will demonstrate how to view, understand and manage customer insights.

Lessons

- Marketing insights
- Customer insights
- Marketing execution insights
- Lead management insights
- Internet marketing insights

After completing this module you will be able to:

- Locate insights.

- Understand marketing insights such as contact, segment, customer journey, marketing email, and leads.

Module 8: Events

In this module you will learn how to manage event planning and execution in Dynamics 365 for Marketing.

Lessons

- Manage event planning
- Manage event execution

After completing this module you will be able to:

- Create in-person and webinar events.
- Set up event planning features such as sessions, speakers, event passes, waitlists, and venues.
- Create and manage recurring events.

Module 9: Surveys

In this module you will review how to configure, design and distribute surveys in Dynamics 365 for Marketing.

Lessons

- Create surveys

After completing this module you will be able to:

- Create a reusable survey theme.
- Create, design, preview and publish a survey.

Module 10: Results

In the Results module, you will review marketing event and survey insights.

Lessons

- Review event and survey results

After completing this module you will be able to:

- Utilize the event dashboard to assess the outcome of your events.