



## Microsoft Dynamics 365 Customer Insights - Journeys (MB-220T00)

### COURSE OVERVIEW

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.

### WHO WILL BENEFIT FROM THIS COURSE?

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

### 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 OBJECTIVES

- Set up and manage Dynamics 365 Customer Insights - Journeys
- Advanced configuration for Dynamics 365 Customer Insights - Journeys
- Review domain authentication, email best practices, and GDPR in Dynamics 365 Customer Insights - Journeys
- Manage assets and content settings in Dynamics 365 Customer Insights - Journeys
- Manage customers in Dynamics 365 Customer Insights - Journeys
- Manage forms and pages in Dynamics 365 Customer Insights - Journeys
- Manage emails, segments, and journeys in Dynamics 365 Customer Insights - Journeys
- Manage subscription centers and double opt-in in Dynamics 365 Customer Insights - Journeys
- Manage website visits, redirect URLs, and social postings in Dynamics 365 Customer Insights - Journeys
- Create an on-site event in Dynamics 365 Customer Insights - Journeys
- Create a webinar event in Dynamics 365 Customer Insights - Journeys
- Promote events, manage registration and check-ins, and review results in Dynamics 365 Customer Insights - Journeys
- Advanced event management features in Dynamics 365 Customer Insights - Journeys
- Evaluate marketing initiatives with analytics in Dynamics 365 Customer Insights - Journeys
- Review the marketing calendar in Dynamics 365 Customer Insights - Journeys



## COURSE OUTLINE

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

- 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

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

- 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.

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

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

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

- 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.

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

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

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

- 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.



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

- 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.

Module 8: Manage subscription centers and double opt-in in Dynamics 365 Customer Insights - Journeys

- 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.

Module 9: Manage website visits, redirect URLs, and social postings in Dynamics 365 Customer Insights - Journeys

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

Module 10: Create an on-site event in Dynamics 365 Customer Insights - Journeys

- 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.

Module 11: Create a webinar event in Dynamics 365 Customer Insights - Journeys

- 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.

Module 12: Promote events, manage registration and check-ins, and review results in Dynamics 365 Customer Insights - Journeys

- Use emails, segments, and journeys to promote your events.
- View and manage event registrations.
- View and manage event attendance.
- Follow up after the event.

Module 13: Advanced event management features in Dynamics 365 Customer Insights - Journeys

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



## Module 14: Evaluate marketing initiatives with analytics in Dynamics 365 Customer Insights - Journeys

- Review and analyze results from Dynamics 365 Customer Insights - Journeys insights.
- Module 15: Review the marketing calendar in Dynamics 365 Customer Insights - Journeys
- Review entity calendars
- Review form calendars
- Create and customize marketing calendars

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