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Learning Style: Virtual Classroom

Provider: Microsoft

Difficulty: Intermediate

Course Duration: 4 Days

Microsoft Dynamics 365 Marketing (MB-220)



*If you enroll in this course at the listed price, you receive a **Free Official Exam Voucher** for the MB-220 Exam. This course does not include Exam Voucher if enrolled within the Master Subscription, however, you can request to purchase the Official Exam Voucher separately.*

About this Course:

Microsoft Dynamics 365 for Marketing is a great tool for transforming markets and nurturing businesses to succeed. This tool helps businesses develop sales-ready leads and maximize marketing ROI by automating processes and integrating marketing & sales. Businesses direly need services of a proficient Microsoft Dynamics 365 professional to streamline marketing strategies. On average, a Microsoft Dynamics 365 Professional earns \$101,413 annually.

This course covers the surveys and events development functionalities in Microsoft Dynamics 365 with the aid of custom demonstrations. The teachings of this course help professionals improve the marketing lifecycle by soliciting feedbacks and understanding customer insights.

Course Objectives:

The core objective of this course is to help professionals gain a better knowledge and sound understanding of the following key principles:

- Setting up Surveys and Events in Microsoft Dynamics 365 for Marketing
- Configuring Core Functionalities and Settings in Microsoft Dynamics 365
- Marketing Application Configuration Review
- Management, Lead Creation, and Scoring
- Developing Marketing Pages and Forms
- Marketing Contacts and Leads Segmentation
- Developing Marketing Emails with Advanced Designer Functionality
- Creating a Marketing Model with Customer Journey and Automated Messaging
- Getting to know Interactive Decision Points & Activity Generation
- Managing and Understanding Customer Insights

Audience:

This course is specifically designed for the following group of professionals and interested candidates:

- Marketing Professionals
- IT Experts
- Professionals Leveraging Microsoft Dynamics 365 for Marketing & Business

Prerequisites:

Professionals planning to enroll in this course must have the fundamental knowledge of Microsoft 365 Dynamics and understanding of marketing strategies, principles, and procedures.

Course Outline:

Module 1: Configure Dynamics 365 Marketing

In this module, you will learn about advanced settings, marketing content, templates

and integrations in Dynamics 365 for Marketing.

Lessons

- Configure organization and management settings
- Configure marketing settings
- Configure events settings

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: Manage segments and lists

This module will review how to create, manage and use segments and subscription centers.

Lessons

- Create and manage segments
- Create and manage subscription centers and lists

After completing this module you will be able to:

- Create and manage segments.
- Create and manage subscription centers.

Module 3: Manage marketing forms and pages

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

Lessons

- Manage forms
- Manage marketing pages

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: Manage leads, accounts, and contacts

This module will cover how to manage customers as accounts or contacts, and how to nurture them through the lead lifecycle.

Lessons

- Create and manage leads
- Manage accounts and contacts

After completing this module you will be able to:

- Track customers as accounts or contacts.
- Create a lead and convert it to an opportunity.
- Manage leads through the lead lifecycle.

Module 5: Manage marketing emails and customer journeys

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

Lessons

- Create marketing emails
- Create customer journeys

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.
- Create a customer journey.

Module 6: Manage events

This module will review the customer journey creation process.

Lessons

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

After completing this module you will be able to:

- Create a webinar event.
- Create an on-site event.
- Promote an event.
- Manage the event website.
- Configure events settings.

Module 7: Create surveys with Dynamics 365 Customer Voice

This module will demonstrate how to create and distribute surveys to customers.

Lessons

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

After completing this module you will be able to:

- Manage surveys using projects.
- Create a survey.
- Personalize a survey.
- Distribute a survey to customers.

Module 8: Analyze insights in Dynamics 365 Marketing

In this module, you will learn about using insights functionality to view and analyze data related to your marketing initiatives.

Lessons

- Evaluate marketing initiatives with analytics

After completing this module you will be able to:

- Use insights to make decisions about marketing efforts.
- Score leads.
- View insights related to customer journeys and email messages

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