MB-220T00: Microsoft Dynamics 365 Customer Insights (Journeys) Functional Consultant

Course ID #: 7000-401-ZZ-Z

Hours: 28

Course Content

Course Description:

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.

Course Objectives:

Upon successful completion of this course, students will be able to:

- Purchase and set up Dynamics 365 Customer Insights - Journeys
- Manage marketing environments
- View versions, quota limits, and usage limits
- Update default settings for landing pages, emails, customer journeys, and more
- Build and protect your send reputation
- Prepare Dynamics 365 for GDPR compliance
- Upload images to the file library and use images in marketing content
- Create keywords and associate them to images
- Identify the core concepts of account-based marketing
- Build marketing form and marketing page templates
- Create redirect URLs
- Create and manage recurring events
- Create and customize marketing calendars

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.

Target 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.

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Topics:

Lesson 1: Set up and manage Dynamics 365 Customer Insights - Journeys
- 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
- Check your knowledge
- Summary

Lesson 2: Advanced configuration for Dynamics 365 Customer Insights - Journeys
- Introduction
- Overview
- Email marketing
- Customer engagement
- Collaboration
- Event management
- Lead management
- Data management
- Customer Insights connector
- Customize Dynamics 365 Customer Insights - Journeys
- Check your knowledge
- Summary

Lesson 3: Review domain authentication, email best practices, and GDPR in Dynamics 365 Customer Insights - Journeys
- Introduction
- Domain authentication
- Email best practices
- Data protection and privacy and personal data compliance
- Check your knowledge
- Summary

Lesson 4: Manage assets and content settings in Dynamics 365 Customer Insights - Journeys
- Introduction
- Upload images
- Manage keywords
- Create reusable content blocks
- Configure content settings
- Check your knowledge
- Summary

Lesson 5: Manage customers in Dynamics 365 Customer Insights - Journeys
- Introduction
- Manage contacts
- Manage accounts
- Account-based marketing
- Manage leads
- Score and qualify leads
- Check your knowledge
- Summary

Lesson 6: Manage forms and pages in Dynamics 365 Customer Insights - Journeys
- 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
- Check your knowledge
- Summary

Lesson 7: Manage emails, segments, and journeys in Dynamics 365 Customer Insights - Journeys
- 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
- Check your knowledge
- Summary

Lesson 8: Manage subscription centers and double opt-in in Dynamics 365 Customer Insights - Journeys
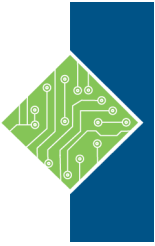- Introduction
- Manage subscription centers
- Set up global double opt-in
- Set up double opt-in on a per form basis
- Check your knowledge
- Summary

Lesson 9: Manage website visits, redirect URLs, and social postings in Dynamics 365 Customer Insights - Journeys
- Introduction
- Monitor website visits and link clicks
- Marketing on social media
- Check your knowledge
- Summary

Lesson 10: Create an on-site event in Dynamics 365 Customer Insights - Journeys
- 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
- Check your knowledge
- Summary

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Lesson 11: Create a webinar event in Dynamics 365 Customer Insights - Journeys
- Introduction
- Configure webinar settings
- Create a non-Teams webinar event
- Create a Microsoft Teams webinar event
- Build the event registration form
- Check your knowledge
- Summary

Lesson 12: Promote events, manage registration and check-ins, and review results in Dynamics 365 Customer Insights - Journeys
- 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
- Check your knowledge
- Summary

Lesson 13: Advanced event management features in Dynamics 365 Customer Insights - Journeys
- Introduction
- Create and manage recurring events
- Create an event template
- Check your knowledge
- Summary

Lesson 14: Evaluate marketing initiatives with analytics in Dynamics 365 Customer Insights - Journeys
- 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
- Check your knowledge
- Summary

Lesson 15: Review the marketing calendar in Dynamics 365 Customer Insights - Journeys
- Introduction
- Entity level calendars
- Form-level calendars
- Create and customize marketing calendars
- Check your knowledge
- Summary

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