MB-7005: Create and manage journeys with Dynamics 365 Customer Insights

Course ID #: 7000-1082-ZZ-Z
Hours: 7
Delivery Method: Group Internet Based

Course Content

Description:

In this course, you practice building journeys using Dynamics 365 Customer Insights. The skills validated include creating marketing assets like emails, creating a segment, creating a journey, adding elements to a journey, and publishing the journey.

Prerequisites:

You should be familiar with the basic features of Dynamics 365 Customer Insights and how to configure them.

Target Audience:

Business Analyst, Functional Consultant

Topics:

Lesson 1: Create emails in Dynamics 365 Customer Insights – Journeys
- Introduction
- Manage assets
- Create marketing emails
- Personalize content
- Use brand profiles
- Use Copilot to generate email content ideas
- Style emails with AI-assisted themes
- Create content blocks
- Preview and test emails
- Check your message for errors and publish
- Send emails without building a journey
- Edit a live email
- Prevent sending emails to duplicated email addresses
- Check your knowledge
- Summary

Lesson 2: Build journeys with Dynamics 365 Customer Insights – Journeys
- Introduction
- Create and manage segments
- Work with triggers
- Create a journey
- Add messages to the journey
- Add AI powered action to the journey
- Add conditions to the journey
- Add activities to the journey
- Add connectors to the journey
- Publish journeys
- Check your knowledge
- Summary

Lesson 3: Guided project - Create and manage journeys with Dynamics 365 Customer Insights
- Introduction
- Prepare for the guided project
- Exercise - Create emails
- Exercise - Create a segment
- Exercise - Create a segment-based journey
- Exercise - Create a trigger-based journey
- Module assessment
- Summary

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NASBA Information

Attendance Requirement: To be awarded the full credit hours, you must sign in and attend the entire course.
Recommended Field(s) of Study:
Recommended CPEs: 7.80

Policies: Course Registration, Cancellation, Refund, and Complaint Resolution
For more information regarding administrative policies such as complaint and program cancellation policies, please contact our offices at 800-639-3535 or visit us at: **www.tcworkshop.com**

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NOTE: Since our information is in multiple places on our website or in PDF format that is sent to clients, we have provided our normal course content with the NASBA Information added along with links to our policy page on the web. We will add our name to the Official National Registry Statement after we are approved.