

Dynamics 365 Customer Insights (Journeys) – Intensive Training («MB220»)

Learn to configure and manage advanced settings and core features within Dynamics 365 for Marketing. Core features include leads, segments, lists, marketing forms, marketing pages, marketing emails, customer journeys, events, and analytics.

Duration: 4 days

Price: 3'400.–

Course documents: Official Microsoft Courseware and Microsoft Learn

Vendor code: MB-220

Content

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.

Course Outline

Module 1: Configure Dynamics 365 Marketing

In this module, you will learn about setting up your Marketing instance and configuring advanced settings.

Lessons

- Set up and manage Dynamics 365 Marketing
- Configure marketing settings

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

Module 3: Manage marketing forms and pages

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

Lessons

- Manage forms
- Manage marketing pages

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

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

Module 6: Manage events

This module will review the customer journey creation process.

Lessons

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

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

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

Key Learnings

- Configure advanced settings
- Manage marketing content, templates and integrations
- Create and manage leads
- Design and create marketing forms and pages
- Create and manage segments
- Set up and launch customer journeys
- Create and manage events
- Distribute and analyze surveys

Target audience

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

Requirements

Knowledge of the Dynamics 365 platform and an understanding of basic marketing principles. Power Platform experience, especially in model-driven applications, is also recommended.

- [Microsoft Dynamics 365 Fundamentals \(CRM\) – Intensive Training \(«MB910»\)](#)

Any questions?

We are happy to advise you on +41 44 447 21 21 or info@digicomp.ch. You can find detailed information about dates on www.digicomp.ch/courses-microsoft-technology/microsoft-business-applications-dynamics-365/microsoft-dynamics-365-customer-engagement/course-dynamics-365-customer-insights-journeys-intensive-training-mb-220