

Module Title : MB-220T01-A: Configure Settings and Core Functionality in Dynamics 365 for Marketing
Duration : 3 days

Overview

Marketing transformation, organization and growth starts here. With Dynamics 365 for Marketing, you can turn prospects into business relationships. Find and nurture more sales-ready leads by moving beyond basic email marketing. Connect sales and marketing, automate processes and make smarter decisions to maximize your marketing ROI.

This course will review the marketing application configuration needed to get started. It will also dive into lead creation, management and scoring. From there, the course will cover creating marketing forms and pages. Then learn how to break up leads and contacts through segmentation to help focus marketing efforts. Next, understand how to create email marketing messages using the advanced designer functionality. Then tie all the pieces together with the customer journey. Dynamics 365 for Marketing allows you to use customer journeys to create a model that helps you guide the members of a selected marketing segment through this process by using automated messaging, activity generation, interactive decision points, and more. Finally, learn how to view, understand and manage customer insights.

Learn all the settings and core functionality within Dynamics 365 for Marketing through custom demonstrations, check your knowledge questions and hands on learning labs.

Audience profile

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

At course completion

After completing this course, you will be able to:

- Configure advanced setting
- Manage marketing content, templates and integrations
- Create and manage leads
- Assess sales readiness through lead scoring models
- Design and create marketing forms and pages

- Create and manage segments, subscription centers, lists and double opt in
- Design and create email messages
- Set up and launch customer journeys
- View, understand and manage customer insights

Course Outline

Module 1: Marketing Application Configuration

In this module, you will learn about advanced settings, marketing content, templates and integrations in Dynamics 365 for Marketing.

Lessons

- Configure advanced settings
- Manage marketing content and templates
- Manage LinkedIn and Power BI integrations

After completing this module, you will be able to:

- Configure advanced settings such as organization, business management, content, marketing and event settings
- Manage marketing content and templates
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Module 2: Leads

This module will review how to create, manage and score leads.

Lessons

- Create and manage leads
- Assess Sales Readiness

After completing this module, you will be able to:

- Create and manage leads
- Synchronize leads from LinkedIn
- Assess sales readiness using lead scoring models

Module 3: Marketing Forms and Pages

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

Lessons

- Create marketing forms
- Create marketing pages

- Manage internet marketing

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: Segments and Lists

This module will cover how to manage segments, subscription centers, lists and double opt-in.

After completing this module, you will be able to:

- Configure static and dynamic segments
- Create a subscription list
- Set up a subscription center page
- Set up and enable a double opt-in process

Module 5: Marketing Emails

This module will cover how to create email messages in Dynamics 365 for Marketing.

Lessons

- Create Email Message

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

Module 6: Customer Journeys

This module will review the customer journey creation process.

Lessons

- Create customer journeys

After completing this module, you will be able to:

- Create a customer journey from a template
- Identify customer journey tiles and properties
- Validate and go live with a customer journey
- Create an account-based customer journey
- Understand the marketing calendar features

Module 7: Insights

This module will demonstrate how to view, understand and manage customer insights.

Lessons

- Marketing insights
- Customer insights
- Marketing execution insights
- Lead management insights
- Internet marketing insights

After completing this module, you will be able to:

- Locate insights
- Understand marketing insights such as contact, segment, customer journey, marketing email, lead, lead scoring, marketing form, marketing page, website and redirect URL

Prerequisites

Before attending this course, students must have:

An understanding of the basics of Dynamics 365 and knowledge of marketing principles, strategies and procedures