COURSE OUTLINE

Microsoft Solutions Partner
Security

Training Services

Course Code: MB-220T00

Course Name: Dynamics 365 Customer Insights – Journeys

DURATION	SKILL LEVEL	DELIVERY METHOD	TRAINING CREDITS	TECHNOLOGY
4 days	Intermediate	VILT/ILT	N/A	Dynamics 365

Course Overview

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.

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.

Job role:	Exam
Functional Consultant	MB-220

Prerequisites

A basic understanding of how to navigate the Dynamics 365 application. Familiarity with creating and managing cases, Entitlements, and Service Level Agreements is also helpful.

Topics

Module 1: Set up and manage Dynamics 365 Customer Insights - Journeys

Are you interested in marketing applications? This module explains how to sign up for a free trial or purchase Dynamics 365 Customer Insights - Journeys.

Learning objectives

In this module, you'll learn how to:

- Sign up for a free trial of Dynamics 365 Customer Insights - Journeys
- Purchase and set up Dynamics 365 Customer Insights - Journeys
- Manage marketing environments
- Keep the marketing app up-to-date
- Uninstall Dynamics 365 Customer Insights - Journeys services

Module 2: Advanced configuration for Dynamics 365 Customer Insights - Journeys

Administrators use settings to fine-tune application behavior, set marketing defaults, check quotas, manage core marketing settings, and more.

Learning objectives

In this module, you will learn how to:

- Access the settings area within Dynamics 365 Customer Insights - Journeys
- View versions, quota limits, and usage limits.
- Update default settings for landing pages, emails, customer journeys, and more.
- Manage customer engagement settings including compliance settings, audience configuration, push notification and SMS provider setup, social media account management, and more.
- Turn on the Microsoft Teams collaboration and chat features for use within the app.
- Set up the connections to webinar providers and manage default settings for events.
- Define how form submissions are matched to existing contacts or leads, configure lead scoring, and enable the Microsoft Dynamics 365 Connector for LinkedIn Lead Gen for your environment.
- Select which entities to sync to Dynamics 365 Customer Insights - Journeys, connect your Dynamics 365 Customer Insights - Journeys environment to Microsoft Azure Blob Storage, and connect Customer Insights to your Dynamics 365 Customer Insights - Journeys environment.

Module 3: Review domain authentication, email best practices, and GDPR in Dynamics 365 Customer Insights - Journeys

Learn about domain authentication, email best practices, and GDPR.

Learning objectives

In this module, you will learn how to:

- Authenticate your domain in Dynamics 365 Customer Insights - Journeys
- Build and protect your send reputation
- Prepare Dynamics 365 for GDPR compliance.

Module 4: Manage assets and content settings in Dynamics 365 Customer Insights - Journeys

Learn about managing assets, keywords, content blocks, and content settings in Dynamics 365 Customer Insights - Journeys.

Learning objectives

In this module, you will learn how to:

- Upload images to the file library and use images in marketing content.
- Create keywords and associate them to images.
- Incorporate content block elements in marketing content.
- Review, update, and create content settings.

Module 5: Manage customers in Dynamics 365 Customer Insights - Journeys

This module covers the basics of contact, accounts, and lead management within Dynamics 365 Customer Insights – Journeys.

Learning objectives

In this module, you will learn how to:

- Manage contacts and accounts in Dynamics 365 Customer Insights - Journeys.
- Identify the core concepts of account-based marketing.
- Score and qualify leads.

Module 6: Manage forms and pages in Dynamics 365 Customer Insights - Journeys

Learn how to manage forms and marketing pages in Dynamics 365 Customer Insights - Journeys.

Learning objectives

In this module, you will learn how to:

- Create and publish marketing forms.
- Add forms to Dynamics 365 Customer Insights - Journeys pages and externally hosted pages.
- Set up form captures.

- Build marketing form and marketing page templates.

Module 7: Manage emails, segments, and journeys in Dynamics 365 Customer Insights - Journeys

This module covers managing marketing emails, segments, customer journeys, and A/B testing in outbound marketing.

Learning objectives

In this module, you'll learn how to:

- Create and publish a marketing email.
- Construct segments within Dynamics 365 Customer Insights - Journeys.
- Leverage segments created within Customer Insights.
- Design and publish a customer journey.
- Run an A/B test in outbound marketing.
- Build marketing email, segment, and customer journey templates.

Module 8: Manage subscription centers and double opt-in in Dynamics 365 Customer Insights - Journeys

Learn about managing subscription centers and double opt-in in Dynamics 365 Customer Insights - Journeys.

Learning objectives

In this module, you will:

- Create a subscription list.
- Build a subscription center form.
- Design a subscription center marketing page.
- Identify a subscription center in content settings.
- Select a content settings record in a customer journey

Module 9: Manage website visits, redirect URLs, and social postings in Dynamics 365 Customer Insights - Journeys

This module discusses managing website visits, redirect URLs, and social postings in Dynamics 365 Customer Insights – Journeys.

Learning objectives

In this module, you will learn how to:

- Monitor website visits.
- Track visitors to your marketing pages.
- Create redirect URLs.
- Schedule and post messages on social media.

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Module 10: Create an on-site event in Dynamics 365 Customer Insights - Journeys

Do you manage and set up events? This module explains the process of creating an on-site event and managing the event details including sessions, speakers, sponsorships, registration, passes, and more within Dynamics 365 Customer Insights – Journeys.

Learning objectives

In this module, you will learn how to:

- Create an in-person event in Dynamics 365 Customer Insights - Journeys.
- Manage sessions, speakers, and sponsorships.
- Configure registration options and setup event passes.
- Capture additional information about the event including financial details and event team members.
- Customize the calendar content for the event.
- Manage event logistics.
- Publish the event and view the event website

Exams and Certifications

A Certificate of completion is issued at the end of the Course.

Schedule your Microsoft exam here: [Microsoft: Pearson VUE](#)

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