

MB-220: Microsoft Dynamics 365 for Marketing

MB-220T01-A: Configure settings and core functionality in Dynamics 365 for Marketing

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

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

MB-220T02-A: Set up events and surveys in Dynamics 365 for Marketing

Course Outline

Module 1: Events

In this module you will learn how to manage event planning and execution in Dynamics 365 for Marketing.

Lessons

- Manage event planning
- Manage event execution

After completing this module, you will be able to:

- Create in-person and webinar events
- Set up event planning features such as sessions, speakers, event passes, waitlists, venues, and sponsors
- Create and manage recurring events
- Create custom registration fields
- Create event outbound messaging
- Set up and manage the event portal, registration and check-in functionality

Module 2: Voice of the Customer

In this module you will review how to configure, design and distribute Voice of the Customer surveys in Dynamics 365 for Marketing.

Lessons

- Create surveys

After completing this module, you will be able to:

- Create a reusable survey theme
- Create, design, preview and publish a survey
- Learn how to distribute a survey through Dynamics 365 for Marketing channels
- Clone, import, translate, close, stop or delete a survey

Module 3: Results

In the Results module, you will review marketing event and survey insights.

Lessons

- Review event and survey results

After completing this module, you will be able to:

- Utilize the event dashboard to assess the outcome of your events