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Microsoft Dynamics 365 for Marketing

Duration: 4 Days   Course Code: M-MB220

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.

Events, webinars and surveys are often a crucial part of how a marketing organization reaches customers. Events and webinars contain many moving parts and can be complex to manage. Dynamics 365 for Marketing simplifies this process by bringing all the planning data into one central location and providing execution channels through a customizable event portal. Surveys are often provided post event but can also be used throughout the marketing lifecycle to solicit feedback. Through Microsoft's Voice of the Customer solution, surveys are easy to set up, manage, execute and associate to an event.

This course will cover event planning including setting up and managing sessions, speakers, passes, waitlists, venues, sponsors, vendors, logistics and accommodations. As well as event execution such as creating custom registration fields, managing registrations and check ins and the event portal. Then the course will cover survey creation and distribution. Finally, it will conclude with event and survey results.

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

Target Audience:

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

Objectives:

- After completing this course, you will be able to:

- **M-MB220T01**

- 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 mange customer insights

- **M-MB220T02**

- Set up and manage event planning capabilities

- Create event messaging, customize the event portal and manage registrations and check ins

- Design, configure and distribute surveys

- Review and understand event and survey insights

Prerequisites:

Before attending this course, students must have:

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

Content:

M-MB220T01

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 integrationsAfter 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
- Create and manage leads
- Assess Sales ReadinessAfter completing this module, you will be able to:
- Create and manage leads
- Synchronize leads from LinkedIn
- Create marketing forms
- Create marketing pages
- Manage internet marketingAfter 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 Email MessageAfter completing this module, you will be able to:
- Create and design email messages
- Preview, validate and go live with email messages
- Create customer journeysAfter 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
- Marketing insights
- Customer insights
- Marketing execution insights
- Lead management insights
- Internet marketing insightsAfter 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
- Manage event planning
- Manage event execution
- Create surveys

After completing this module, you will be able to:

- Configure static and dynamic segments
- Create a subscription list
- Set up a subscription center page
- 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
- Create a reusable survey theme
- Create, design, preview and publish a survey
- Learn how to distribute a survey through Dynamics 365 for Marketing channels
- Utilize the event dashboard to assess the outcome of your events
- View the results of your surveys

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

- Configure advanced settings
- Manage marketing content and templates
- Manage LinkedIn and Power BI integrationsAfter 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
- Create and manage leads
- Assess Sales ReadinessAfter completing this module, you will be able to:
- Create and manage leads
- Synchronize leads from LinkedIn
- Create marketing forms
- Create marketing pages
- Manage internet marketingAfter 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 Email MessageAfter completing this module, you will be able to:
- Create and design email messages
- Preview, validate and go live with email messages

Module 1: Events

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

Lessons

- Configure advanced settings
- Manage marketing content and templates
- Manage LinkedIn and Power BI integrationsAfter 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
- Create and manage leads
- Assess Sales ReadinessAfter completing this module, you will be able to:
- Create and manage leads
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- Create marketing forms
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- Lead management insights
- Internet marketing insightsAfter completing this module, you will be able to:
- Locate insights
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- Manage event planning
- Manage event execution
- Create surveys
- Review event and survey results

- Review event and survey results

Module 2: Leads

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

Lessons

- Configure advanced settings
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- Manage LinkedIn and Power BI integrationsAfter completing this module, you will be able to:
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- Manage marketing content and templates
- Create and manage leads
- Assess Sales ReadinessAfter completing this module, you will be able to:
- Create and manage leads
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- Create marketing forms
- Create marketing pages
- Manage internet marketingAfter completing this module, you will be able to:
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- Manage event planning
- Manage event execution
- Create surveys
- Review event and survey results

Assess sales readiness using lead scoring modelsl

- Create customer journeysAfter 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
- Marketing insights
- Customer insights
- Marketing execution insights
- Lead management insights
- Internet marketing insightsAfter completing this module, you will be able to:
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- Manage event planning
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- Review event and survey results

Save an email message as a template

Module 6: Customer Journeys

This module will review the customer journey creation process.

Lessons

- Configure advanced settings
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- Manage marketing content and templates
- Create and manage leads
- Assess Sales ReadinessAfter completing this module, you will be able to:
- Create and manage leads
- Synchronize leads from LinkedIn
- Create marketing forms
- Create marketing pages
- Manage internet marketingAfter 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

After completing this module, you will be able to:

- Configure static and dynamic segments
- Create a subscription list
- Set up a subscription center page
- 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
- Create a reusable survey theme
- Create, design, preview and publish a survey
- Learn how to distribute a survey through Dynamics 365 for Marketing channels
- Utilize the event dashboard to assess the outcome of your events
- View the results of your surveys

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

- Configure advanced settings
- Manage marketing content and templates
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- Create and manage leads
- Assess Sales ReadinessAfter completing this module, you will be able to:
- Create and manage leads
- Synchronize leads from LinkedIn
- Create marketing forms
- Create marketing pages
- Manage internet marketingAfter 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 Email MessageAfter completing this module, you will be able to:
- Create and design email messages
- Preview, validate and go live with email

Module 3: Marketing Forms and Pages

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

Lessons

- Configure advanced settings
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- Manage LinkedIn and Power BI integrationsAfter completing this module, you will be able to:
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- Lead management insights
- Internet marketing insightsAfter completing this module, you will be able to:
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- Manage event planning
- Manage event execution
- Create surveys
- Review event and survey results

Create marketing form and page templates

- Create Email MessageAfter completing this module, you will be able to:
- Create and design email messages
- Preview, validate and go live with email messages
- Create customer journeysAfter completing this module, you will be able to:
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Understand the marketing calendar features

Module 7: Insights

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

Lessons

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- Create, design, preview and publish a survey
- Learn how to distribute a survey through Dynamics 365 for Marketing channels
- Utilize the event dashboard to assess the outcome of your events
- View the results of your surveys

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

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

Module 4: Segments and Lists

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

- Create marketing forms and embed them on marketing pages
- Create a marketing page
- Preview, validate and go live with a marketing page
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- View the results of your surveys

Further Information:

For More information, or to book your course, please call us on +91 40 23222555

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