

Microsoft Dynamics 365 for Marketing

Duration: 4 Days Course Code: M-MB220

Overview:

New & Exclusive - This course will review the marketing application configuration needed to drive business growth.

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.

Target Audience:

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

Objectives:

- Students will learn to,
- Set up and manage Dynamics 365 Marketing
- Advanced configuration for Dynamics 365 Marketing
- Review domain authentication, email best practices, and GDPR in Dynamics 365 Marketing
- Manage assets and content settings in Dynamics 365 Marketing
- Manage customers in Dynamics 365 Marketing
- Manage forms and pages in Dynamics 365 Marketing
- Manage emails, segments, and journeys in Dynamics 365 Marketing
- Manage subscription centers and double opt-in in Dynamics 365 Marketing
- Manage website visits, redirect URLs, and social postings in Dynamics 365 Marketing
- Create an on-site event in Dynamics 365 Marketing
- Create a webinar event in Dynamics 365 Marketing
- Promote events, manage registration and check-ins, and review results in Dynamics 365 Marketing
- Advanced event management features in Dynamics 365 Marketing
- Evaluate marketing initiatives with analytics in Dynamics 365 Marketing
- Review the marketing calendar in Dynamics 365 Marketing

Prerequisites:

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

Testing and Certification

- Exam MB-220: Microsoft Dynamics 365 Marketing Functional Consultant

Content:

Module 1: Set up and manage Dynamics 365 Marketing

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

Module 2: Advanced configuration for Dynamics 365 Marketing

- Access the settings area within Dynamics 365 Marketing
- 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 marketing 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 Marketing, connect your Dynamics 365 Marketing environment to Microsoft Azure Blob Storage, and connect Customer Insights to your Dynamics 365 Marketing environment.

Module 3: Review domain authentication, email best practices, and GDPR in Dynamics 365 Marketing

- Authenticate your domain in Dynamics 365 Marketing
- Build and protect your send reputation
- Prepare Dynamics 365 for GDPR compliance

Module 4: Manage assets and content settings in Dynamics 365 Marketing

- 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 6: Manage forms and pages in Dynamics 365 Marketing

- Create and publish marketing forms.
- Add forms to Dynamics 365 Marketing 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 Marketing

- Create and publish a marketing email.
- Construct segments within Dynamics 365 Marketing.
- 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 Marketing

- 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 Marketing

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

Module 10: Create an on-site event in Dynamics 365 Marketing

- Create an in-person event in Dynamics 365 Marketing.
- 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.

Module 11: Create a webinar event in Dynamics 365 Marketing

- Configure webinar settings for On24 and other third-party webinar providers.
- Create a webinar event using On24 or other third-party webinar providers.
- Create a webinar event using Microsoft Teams.
- Build the registration form for a virtual event.

Module 12: Promote events, manage registration and check-ins, and review results in Dynamics 365 Marketing

- Use emails, segments, and journeys to promote your events.
- View and manage event registrations.
- View and manage event attendance.
- Follow up after the event.

Module 13: Advanced event management features in Dynamics 365 Marketing

- Create and manage recurring events.
- Create an event template.

Module 14: Evaluate marketing initiatives with analytics in Dynamics 365 Marketing

- Review and analyze results from Dynamics 365 Marketing insights.

Module 15: Review the marketing calendar in Dynamics 365 Marketing

- Review entity calendars
- Review form calendars
- Create and customize marketing calendars

Module 5: Manage customers in Dynamics 365
Marketing

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

Further Information:

For More information, or to book your course, please call us on Head Office 01189 123456 / Northern Office 0113 242 5931

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