Microsoft Dynamics 365 Marketing

Module 1: Configure Dynamics 365 Marketing

In this module, you will learn about setting up your Marketing instance and configuring advanced settings.

Lessons

- Set up and manage Dynamics 365 Marketing

- Configure marketing settings

- Domain authentication, email best practices, and GDPR

- Manage assets and content settings

After completing this module, students will be able to:

- Set up your Marketing application.

- Configure advanced settings such as organization, business management, and content.

- Set up your asset library

- Configure domain authentication

Module 2: Manage customers in Dynamics 365 Marketing

This module will cover how to manage customers as accounts or contacts, and how to nurture them through the lead lifecycle.

Lessons

- Manage accounts and contacts

- Create and manage leads

After completing this module, students will be able to:

- Track customers as accounts and contacts.

- Perform account-based marketing.

- Configure a lead scoring model.

Module 3: Manage marketing forms and pages

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

Lessons

- Manage forms

- Manage marketing pages

After completing this module, students 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: Manage segments and subscription centers

This module will cover how to create different types of segments, how to build a subscription center, and how to configure double opt-in.

Lessons

- Create and manage segments

- Manage subscription centers and double opt-in

After completing this module, students will be able to:

- Build a segment.

- Create a subscription center.

- Manage global and form-specific double opt-in.

Module 5: Manage emails and journeys in Dynamics 365 Marketing

This module will cover how to create email messages and customer journeys in Dynamics 365 Marketing.

Lessons

- Create marketing emails

- Create customer journeys

- Manage content, event triggers and journeys in real-time marketing

- Manage website visits, redirect URLs, and social postings

After completing this module, students will be able to:

- Create and design email messages.

- Preview, validate and go live with email messages.

- Save an email message as a template.

- Create a customer journey.

- Use real-time marketing and event triggers in customer journeys.

- Configure redirect URLs.

Module 6: Manage events

This module will review the customer journey creation process.

Lessons

- Create an event

- Create a webinar event

- Promote and manage events

- Advanced event management features

After completing this module, students will be able to:

- Create an event.

- Create a webinar event using Teams as a webinar provider.

- Promote an event.

- Manage the event website.

- Configure events settings.

Module 7: Create surveys with Dynamics 365 Customer Voice

This module will demonstrate how to create and distribute surveys to customers.

Lessons

- Create a survey project

- Create surveys with Dynamics 365 Customer Voice

- Send Dynamics 365 Customer Voice surveys

After completing this module, students will be able to:

- Manage surveys using projects.

- Create a survey.

- Personalize a survey.

- Distribute a survey to customers.

Module 8: Analyze insights in Dynamics 365 Marketing

In this module, you will learn about using insights functionality to view and analyze data related to your marketing initiatives.

Lessons

- Evaluate marketing initiatives with analytics

- Review the marketing calendar

After completing this module, students will be able to:

- Use insights to make decisions about marketing eefforts.

- Score leads.

- View insights related to customer journeys and email messages.

- Use the marketing calendar to track your initiatives.