

# Microsoft Dynamics 365 Marketing

## **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, and content.  
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.

### **Lessons**

Create and manage segments  
Create and manage subscription centers  
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 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.  
Understand marketing insights such as contact, segment, customer journey, marketing email, and leads.

### **Module 8: 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, and venues.

Create and manage recurring events.

### **Module 9: Surveys**

In this module you will review how to configure, design and distribute 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.

### **Module 10: 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.