

MB-220: Microsoft Dynamics 365 Customer Insights (Journeys) Functional Consultant

Course outline

Standard Duration: 32 Hours

Learning Path 1: Configure Dynamics 365 Customer Insights – Journeys

Dynamics 365 Customer Insights - Journeys elevate customer experiences, allowing you to orchestrate personalized journeys across all touchpoints to strengthen relationships and earn loyalty. The Dynamics 365 Customer Insights - Journeys app works seamlessly with Dynamics 365 Sales, Dynamics 365 Customer Insights, Microsoft Teams, and other products and allows you to make faster and better decisions using the power of data and AI

Lessons

- Set up and manage Dynamics 365 Customer Insights - Journeys
- Configure marketing settings
- Domain authentication, email best practices, and GDPR
- Manage assets and content settings

Lab Practice:

Lab 1.1: Validate lab environment

Lab 1.2: Prepare Customer Insights - Journeys environment

After completing this module, students will be able to:

- Set up and manage the application and environment
- Configure marketing settings
- Manage GDPR compliance, domain authentication, and marketing assets

Learning Path 2: Manage customers in Dynamics 365 Customer Insights – Journeys

Developing and maintaining your customer database is key to being able to market through Dynamics 365 Customer Insights - Journeys. Three of the most important and common types of database records are contacts, accounts, and leads. These fundamental business entities are shared by most Dynamics 365 apps for the Microsoft Dataverse platform, including Customer Insights - Journeys. App users need to understand how these entities are used and affected by the Customer Insights - Journeys app.

Lessons

- Manage accounts and contacts
- Create and manage leads

Lab Practice:

Lab: Self Practice recommended. No official Lab is available.

After completing this module, students will be able to:

- Review the tables used to track customers
- Review the important data tracked on each table
- Create a lead scoring model and use LinkedIn Lead Gen

Learning Path 3: Manage forms

With Dynamics 365 Customer Insights - Journeys, you can create marketing pages where your customers and prospects can learn more about your organization. You can include marketing forms on those pages so that people can sign up to learn more about your products or services.

Lessons

- Manage forms
- Manage marketing pages

Lab Practice:

Lab 3.1: Create a form

After completing this module, students will be able to:

- Understand the types and purposes of marketing forms and pages
- Understand how to use the real-time form designer and host the form
- Examine the differences between real-time and outbound forms

Learning Path 4: Manage segments and consent

Dynamics 365 Customer Insights - Journeys helps you develop engaging email content, define your target audiences through segmentation, and automate the way that those audiences receive and interact with your marketing through customer journeys.

Lessons

- Create and manage segments
- Create and manage subscription centers and consent

Lab Practice:

Lab 4.1: Create a segment

Lab 4.2: Create a compliance profile

After completing this module, students will be able to:

- Build segments (both outbound and real-time)
- Configure a subscription center in outbound marketing
- Manage contact point consent in real-time marketing

Learning Path 5: Manage emails and journeys in outbound marketing

Dynamics 365 Customer Insights - Journeys helps you develop engaging email content, define your target audiences through segmentation, and automate the way that those audiences receive and interact with your marketing through customer journeys.

Lessons

- Create marketing emails in outbound marketing
- Create outbound customer journeys
- Manage website visits, redirect URLs, and social postings

Lab: Self Practice recommended. No official Lab is available.

After completing this module, students will be able to:

- Design marketing emails
- Create a customer journey using the customer journey designer
- Manage website visits, redirect URLs, and social posting

Learning Path 6: Manage emails and journeys in real-time marketing

Dynamics 365 Customer Insights - Journeys helps you develop engaging email content, define your target audiences through segmentation, and automate the way that those audiences receive and interact with your marketing through customer journeys.

Lessons

- Create emails in real-time marketing
- Create text messages and push notifications in real-time marketing
- Create real-time journeys

Lab Practice:

Lab 6.1: Create an email

Lab 6.2: Create a journey

After completing this module, students will be able to:

- Design marketing emails using the real-time marketing email designer
- Configure text messages and push notifications
- Create journeys using real-time event triggers

Learning Path 7: Manage events

With Microsoft Dynamics 365 Customer Insights - Journeys, you get end-to-end event management. From initial planning and budgeting through promotion and publication, Dynamics 365 Customer Insights - Journeys is your one-stop source for event planning and implementation. It also includes attendee registration, webinar broadcasting, lead generation, analytics, and more.

The event management features of Dynamics 365 are collected in their own work area, which helps make it easier for you to find the relevant entities and settings while you're focusing on events. To access these features from within Dynamics 365 Customer Insights - Journeys, expand the work-area menu in the lower-left corner of the side navigator and select Events. In the Events work area, you can go between event-related entities by using the side navigator.

Lessons

- Create an on-site event
- Create a webinar event
- Promote and manage events
- Advanced event management features

Lab Practice:

Lab 7.1: Set up buildings and speakers

After completing this module, students will be able to:

- Create an event, including event teams, venues, speakers, sessions, and registration
- Create a webinar event and use Teams as a webinar provider
- Promote and manage events using emails, journeys (outbound or real-time), or social media

Learning Path 8: Create surveys with Dynamics 365 Customer Voice

Lessons

- Create a survey project
- Create surveys with Dynamics 365 Customer Voice
- Send Dynamics 365 Customer Voice surveys

Lab Practice:

Lab 8.1: Create an event and a post-event survey

After completing this module, students will be able to:

- Gather customer feedback through Customer Voice
- Customize surveys to match your organization's brand presence for a familiar experience

- Share journeys with customers

Learning Path 9: Analyze insights with Dynamics 365 Customer Insights – Journeys

Dynamics 365 Customer Insights - Journeys helps you make smarter decisions by being able to monitor real-time interactions from pages, forms, emails, websites, and more. You can also track the interactions of your contacts and view analytics to understand your impact and improve your marketing content.

Lessons

- Evaluate marketing initiatives with analytics
- Interpret analytics in real-time marketing
- Review the marketing calendar

Lab Practice:

Lab 9.1: Access insights in Dynamics 365 Customer Insights - Journeys

After completing this module, students will be able to:

- Understand the different insights features and how to use them
- Understand real-time marketing analytics and how to use them
- Use the marketing calendar