

KOENIG SOLUTIONS • COURSE OUTLINE

MB-220T00: Dynamics 365 Customer Insights - Journeys

Learn to configure, run and analyse marketing campaigns, journeys, events and surveys in Dynamics 365 Customer Insights - Journeys.

4 Days

32 HOURS

7

MODULES

23

TOPICS

10

HANDS-ON LABS

COURSE OVERVIEW

The MB-220T00: Dynamics 365 Customer Insights - Journeys course is designed to equip learners with the knowledge and skills to implement, manage, and utilize the marketing capabilities of Dynamics 365 Marketing. Throughout the course, participants will learn how to Set up and manage Dynamics 365 Marketing, ensuring they can effectively Configure marketing settings, Handle domain authentication, and adhere to Email best practices and GDPR regulations. Learners will gain hands-on experience in Managing customers, Creating marketing forms and pages, Developing targeted segments, and Managing subscription centers to comply with Double opt-in requirements. They will also dive into creating and managing both outbound and real-time marketing emails, Customer journeys, and strategies for Managing events and webinars. The course delves into creating surveys with Dynamics 365 Customer Voice and Analyzing marketing insights, providing learners with the tools to evaluate marketing initiatives and interpret analytics. By the end of the course, participants will have a comprehensive understanding of how to review event and survey results, positioning them to drive successful marketing strategies using Dynamics 365 Marketing.

Who Should Attend

The MB-220T00: Dynamics 365 Customer Insights - Journeys course equips professionals to leverage marketing tools within Dynamics 365. Job roles and audience for the course:

Marketing Managers and Executives

CRM Managers

Sales and Marketing Analysts

Digital Marketing Specialists

Customer Relationship Managers

Marketing Automation Consultants

Dynamics 365 Administrators and Consultants

Data Analysts focused on customer insights

IT Professionals aiming to implement marketing solutions

Business Analysts seeking to understand customer journey analytics

Professionals working on GDPR compliance within marketing teams

Email Marketing Managers

Event Coordinators and Planners managing events through Dynamics 365

Customer Service Managers looking to enhance customer experiences

Product Managers integrating marketing insights into product development

LEARNING OBJECTIVES

- Configure marketing settings and manage consent and compliance
- Identify audience segments and manage leads and lead scoring
- Create emails, forms, text messages and push notifications
- Build customer journeys with triggers and journey elements
- Publish journeys and extend them with Dataverse triggers
- Plan and manage on-site events and webinars
- Create and send surveys with Dynamics 365 Customer Voice
- Evaluate marketing initiatives using analytics and aggregate insights

7 Modules, 23 Topics

01

3 Labs

Learning Path 1: Configure Dynamics 365 Customer Insights - Journeys

TOPICS

- **Module 1:** Set up and manage Dynamics 365 Customer Insights - Journeys
- **Module 2:** Configure marketing settings
- **Module 3:** Review email settings and best practices
- **Module 4:** Upload and manage content
- **Module 5:** Manage consent and compliance

02

Learning Path 2: Manage Your Audience in Dynamics 365 Customer Insights - Journeys

TOPICS

Module 1: Get to know your audience · **Module 2:** Manage leads and lead scoring

03

2 Labs

Learning Path 3: Create Emails, Forms, Text Messages, and Push Notifications

TOPICS

- **Module 1:** Create emails
- **Module 2:** Create forms
- **Module 3:** Create text messages and push notifications

04

2 Labs

Learning Path 4: Create Segments and Journeys

TOPICS

- **Module 1:** Create and manage segments
- **Module 2:** Create a journey and work with triggers
- **Module 3:** Add elements to a journey
- **Module 4:** Publish journeys
- **Module 5:** Extend real-time capabilities with Dataverse triggers

05

2 Labs

Learning Path 5: Manage Events

TOPICS

Module 1: Create an on-site event · **Module 2:** Create a webinar event · **Module 3:** Promote and manage events

06

Learning Path 6: Create Surveys with Dynamics 365 Customer Voice

TOPICS

- **Module 1:** Create a survey project
- **Module 2:** Create surveys with Dynamics 365 Customer Voice
- **Module 3:** Send Dynamics 365 Customer Voice surveys

07

Lab

Learning Path 7: Analyze Insights with Dynamics 365 Customer Insights - Journeys

TOPICS

- **Module 1:** Evaluate marketing initiatives with analytics
- **Module 2:** View aggregate analytics

HANDS-ON LABS

Practise What You Learn

#	MODULE	ACTIVITY
01	Learning Path 1: Configure Dynamics 365 Customer Insights - Journeys	■ Lab 1.1: Validate lab environment ■ Lab 1.2: Prepare Customer Insights - Journeys Environment ■ Lab 1.3: Create a compliance profile
03	Learning Path 3: Create Emails, Forms, Text Messages, and Push Notifications	■ Lab 3.1: Create a form ■ Lab 3.2: Create an email
04	Learning Path 4: Create Segments and Journeys	■ Lab 4.1: Work with segments ■ Lab 4.2: Create a journey
05	Learning Path 5: Manage Events	■ Lab 5.1: Set up buildings and speakers ■ Lab 5.2: Create an event and an event journey

#	MODULE	ACTIVITY
07	Learning Path 7: Analyze Insights with Dynamics 365 Customer Insights - Journeys	Lab 7.1: Review insights in Dynamics 365 Customer Insights - Journeys

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

FLEXIBLE DELIVERY

Learn the Way That Suits You

Classroom Training

Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

Flexi (Self-Paced)

1-on-1 Training

Ready to Get Started?

Talk to a learning advisor about schedules, group training and customised delivery.

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