Quick Start for Marketing Team: 5-Day Dynamics 365 Marketing Implementation

A fully functional Dynamics 365 Marketing solution installed and configured within five days? Yes, it's possible!

Led by one of our seasoned CRM consultants, this 5-day workshop is specifically focused on quickly getting you and running on the core capabilities of Dynamics 365 Marketing.

Day 1
1. Analysis of marketing team's business needs
2. Analysis of marketing-related business processes
3. Recommendations on which business processes to integrate within the Dynamics 365 Marketing application

Day 2
1. Configuration of core application settings
2. Set up users and permissions
3. Import of initial customer data from CSV file
4. Enabling of email boxes

Day 3
1. Creation of 1 marketing segment
2. Creation of 1 customer journey template
3. Create of 1 emailing marketing template
4. Download Power BI reports and templates

Day 4
1. Tests and validation
2. Adjustments according to tests and validation results

Day 5
1. Admin training
2. Basic user training

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