



## Course 816701 • Microsoft Dynamics 365

# Drive Marketing Automation with Dynamics 365 CRM & Click Dimensions

### Length

- 1 day

### Prerequisites

- Basic customer and account entry information in Dynamics 365

### Audience

- Sales, marketing and customer service representatives using Dynamics software

### What You'll Learn

- Design attractive and effective messages for email marketing campaigns
- Use marketing pages to interact with contacts online
- Create automatic, interactive customer journeys
- Plan, promote, and manage marketing events and webinars
- Generate, score, and qualify leads for sales
- Connect to LinkedIn to import promising new leads straight into Dynamics 365

This one-day instructor-led workshop provides marketing professionals with the skills and knowledge to run the marketing portion of Dynamics 365 (CRM). Learn to design attractive and effective messages for email marketing campaigns. See how marketing pages interact with contacts online. Attendees will set up automatic marketing campaigns, and run email marketing campaigns.

Post your webinars on EventBrite, GoToWebinar, WebEx, Eventbrite, and Cvent to import promising new leads straight into Dynamics 365 (CRM). Manage your events in one place.

### Workshop Outline

#### Module 1: Core Marketing with Dynamics 365 Marketing

- Basic navigation and application tools
- Customize templates for emails
- Email sends and statistics
- Subscription management
- Develop landing pages
- Set up lead scoring

#### Module 2: Work with Campaigns

- Use Journey Designer to create an automated, multichannel campaigns
- Generate follow-up activities and launch workflows
- Track and analyze campaign results

#### Module 3: Event Management

- Create, organize and promote in-person or webinar events

- Use the online portal to setup events, schedule, speakers and registration

#### **Module 4: Share Information Across Teams**

- Connect sales and marketing processes to automate follow-ups and track lead progress
- Create or use existing dashboards & reports for marketing initiatives
- Identify your best lead sources & marketing activities