



Dynamics 365 Marketing – 5 days with Lab

Duration: 5 days
Delivery: Online

Difficulty: Intermediate
Audience: IT Analysts/Marketing Professionals

Course outline

The 5-day course will be tailored as per the targeted audience and any specific business requirements. The course will be delivered online in focused and personalized session to provide an in depth understanding of core functionality offered in Dynamics 365 for Marketing. The course will cover all features and functionality offered including the new features introduced in the latest release.

Key Learnings

After completing this training, the users shall be able to understand Dynamics 365 solution architecture. The users shall be able to maximize their marketing efforts leveraging the functionality offered in the Dynamics 365 for Marketing app. The users will have an in-depth knowledge of designing marketing emails, forms & landing pages, manage end to end customer journeys etc. We will also cover customer insights.

This is an interactive course with demonstrations, knowledge check questions, and hands-on learning labs using your existing data. We will help you successfully set up and manage Marketing app for your organization.

Day 1

Module 1: Overview and Marketing Application Configuration

- Configure advanced settings
- Manage marketing content and templates
- Manage LinkedIn and Power BI integrations
- Send SMS messages using Twilio and TeleSign integration

Module 2: Leads

- Create and manage leads
- Assess Sales Readiness
- Create Lead scoring model

Day 2

Module 3: Segments and Lists

- Create and manage static and dynamic segments.
- Create and manage subscription centers
- Create a subscription list.
- Set up a subscription center page.
- Set up and enable a double opt-in process

Module 4: Marketing Forms and Pages

- Create marketing forms
- Create marketing pages
- Manage internet marketing

Day 3

Module 5: Marketing Emails

- Create Email message
- Create Email templates

Module 6: Customer Journeys

- Create customer journeys
- 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
- Real time customer journey orchestration

Day 4

Module 7: Insights

- Marketing insights
- Customer insights
- Marketing execution insights
- Lead management insights
- Internet marketing insights

Module 8: Events

- Manage event planning
- Manage event execution
- Create in-person and webinar events
- Set up event planning features such as sessions, speakers, event passes, waitlists, venues, sponsors
- Create and manage recurring events
- Create custom registration fields
- Create event outbound messaging
- Set up and manage the event portal, registration, and check-in functionality

Day 5

Module 9: Voice of the Customer

- Create surveys
- Create a reusable survey theme
- Create, design, preview, and publish a survey
- Learn how to distribute a survey through Dynamics 365 for Marketing channels
- Clone, import, translate, close, stop, or delete a survey

Module 10: Results

- Review event and survey results
- Utilize the event dashboard to assess the outcome of events
- View the results of surveys

Recommended Qualifications

Attendees should understand the basics of Dynamics 365 and marketing principles, strategies, and procedures.

The basic concepts of Dynamics 365 or Marketing will not be covered in this course. It is expected that the attendees will already possess this knowledge.

Hardware Requirements

- An Intel Core-i5-based PC
- USB port
- Microsoft Account
- 4 GB RAM
- 128 GB HDD
- Windows 8 or later
- Office 2013 Professional Plus
- Internet access with at least 1 Mbps bandwidth per student.