

Course Outline | Dynamics 365 for Marketing

2 day(s)

About this Course:

After completing the course, delegates will be able to set up, manage and use the Dynamics 365 for Marketing application and its capabilities.

Prerequisites:

Before attending this course, students must have:

- General knowledge of Microsoft Windows.
- General knowledge of Microsoft Office.

Audience Profile:

Candidates for this course who will implement, use, maintain, or support Microsoft Dynamics 365 for Marketing in their own or their customers' organizations.

Please note: This course is for the new Dynamics 365 for Marketing product, rather than the older Microsoft Dynamics Marketing service (which has been discontinued by Microsoft).

Course Outline

Module 1: Manage Segments and Lists

- Create & Manage Segments including, static, dynamics & suppression segments
- Combine segments using union, intersect & exclude logic
- Create & Manage Subscription Centres & Subscription Lists
- Add a Subscription List to a Form

Module 2: Create and Manage Marketing Forms and Pages

- Create Marketing Forms
- Understand Form Requirements & Limitations
- Create Landing Form, Subscription Centre & Forward to a Friend Pages
- Add Form Blocks to Pages
- Apply Styles to Marketing Pages
- Integrate Marketing Pages with Marketing Mails
- Preview, Validate and Publish Marketing Pages

Module 3: Manage Leads

- Create and Manage Leads & Relate them to the Dynamics 365 Sales Cycle
- Create Leads Automatically & Manually Synchronise Leads from LinkedIn using the LinkedIn Connector
- Assess Sales Readiness Using Advanced Lead
- Scoring and Lead Conversion Metrics

Module 4: Create and Manage Marketing Emails

- Create and Manage Emails using Email Templates
- Use HTML in Emails
- Add Dynamic Content to Emails
- Publish, Preview & Validate Email Messages

Module 5: Manage Customer Journeys

- Create Customer Journeys
- Use Journey Templates

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- Implement Journey Templates
- Employ Flow Controls
- Publish and Manage Journeys
- Publish Campaigns
- Display Customer Journey Insights

Module 6: Manage Events

- Create Events & Webinars
- Create Event Teams
- Set-up Sessions, Speakers, Venues & Event Passes
- Manage Sponsors, Vendors, Logistics & Accommodations
- Configure the Events Portal
- Create Event Invitations, Banners & Social Media Posts
- Register & Check-In Attendees

Module 7: Create and Distribute Surveys

- Create Preview Test & Publish Surveys
- Add Surveys to Emails & Portal Pages
- Manage Survey Responses
- Run Reports on Survey Responses
- Create Leads from Survey Responses