

# Course Outline | Dynamics 365 Working with Customer Journeys

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1 day(s)

## Overview

Upon completing this one-day course you will have learnt how to:

- Define market segments
  - Design profile-based dynamic segments
  - Use the explore view
  - Design interaction-based dynamic segments
  - Define a static segment
  - Combine segments into a compound segment
- Work with customer journeys
  - Create automated campaigns with customer journeys
  - Create and manage customer journey templates
  - Create an inbound customer journey
  - Use Customer journey tiles
- Manage, score and qualify leads

## Course Outline

### Topics

- Creating marketing segments that organise contacts from your database into logical groups that match your marketing strategies.
- Creating a marketing email that meets all legal and deliverability requirements and can deliver personalised messages to contacts.
- Creating a simple customer journey that sends a marketing email to all members of a segment and records interactions such as message opens and link clicks.
- Creating a landing page with a form that collects information from new and existing contacts and stores it directly in Dynamics 365 for Customer Engagement.
- Creating an automated customer journey that combines email messaging, landing pages, and multiple paths managed by interactive triggers.
- Setting up automatic lead scoring, which can score leads based on demographic information and interaction records.
- Setting up a subscription centre with custom subscription lists and include it in your emails and customer journeys.
- Creating a customer journey that generates activities (such as phone calls, tasks, or appointments), assigns them to relevant staff, and associates each with a contact on that journey.
- Managing images for use in marketing emails and pages.
- Tracking website visits, social media clicks, and banner clicks so you can use them to score leads and evaluate the effectiveness of your website and other marketing channels.
- Using lead generation created by a create-lead tile in a customer journey. These leads can be linked to either a contact or an account, depending on the tile and customer journey settings.