



## Dynamics 365 Marketing

# Course Level: 100



This instructor-led course provides a key step for Administrators and Marketing power users who are beginning or advancing their knowledge of Microsoft Dynamics 365 Marketing. With the evolution of the Dynamics 365 product, this course will focus on the core out-of-the-box Marketing business application capabilities while driving understanding surrounding the competencies needed for attendees to have big impacts on their organization. This fast-paced course covers the latest and greatest in Microsoft new feature releases to ensure that attendees are empowered to leverage the full capabilities of their organization's Dynamics 365 Marketing environment



# At A Glance:

## Dynamics 365 Marketing



### Why Enroll?

Empower Admins and power users to gain a wholistic understanding of Marketing features and functionality.



### Key Takeaways

Dynamics 365 Marketing key features & navigation, Content Management, Digital Marketing Content, Pages, Forms, Emails, Subscription Centers, Segments, Leads, Lead Scoring, Customer Journeys & Administration.



### Who to Enroll?

- System Administrators
- Power Users
- Marketing Professionals



### Register

Register for Dynamics 365 Marketing today!

[Click to Register.](#)



# About This Training



## Intended Audience

This course is designed to support individuals who will be administering or heavily using Microsoft Dynamics 365 Marketing. It provides attendees who have limited or no exposure to Dynamics 365 Marketing a breadth understanding of the application. Attendees who are migrating from another Marketing solution, including the previous Microsoft solution, MDM (Microsoft Dynamics Marketing), will find value in learning new features and functionality of the most recent release.



## Required Prerequisites

Participants are highly advised to be comfortable and confident with the following skills and concepts for a successful learning experience:

- Navigation
- Data entry
- Advanced Find
- Create custom fields
- Customized forms and system views



## Recommended Prerequisites

Prerequisites are recommendations, and while not required, they are highly advised to ensure a successful learning experience:

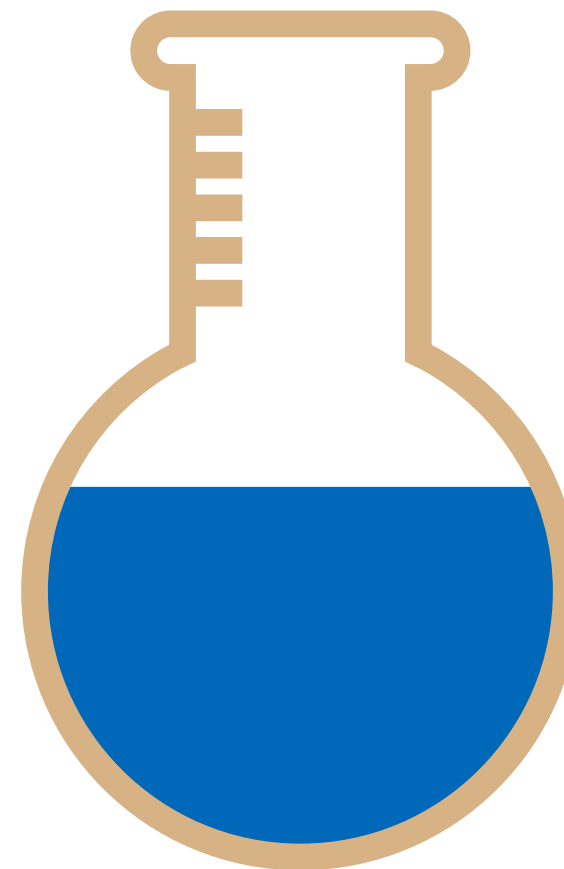
- Understanding of data or relational databases is helpful
- Exposure to other Microsoft Dynamics 365 business applications is helpful, but not necessary



# Key Takeaways

## This Training Will Empower You To:

- Use the Dynamics 365 Marketing navigation to access records, views, dashboards, insights, calendars, and forms
- Understand the core record types and feature functionality of the app
- Learn about content management of images and keyword tagging and content blocks as well as importing and exporting data out of Dynamics 365 Marketing
- Learn how to create digital marketing content through the combination of Marketing Forms, Pages, and Emails
- Create segmented lists full of contacts to receive your marketing content and campaigns
- Understand the Lead Lifecycle and the Marketing to Sales Pipeline
- Build lead scoring models by defining conditions and corresponding actions
- Learn how to create Customer Journeys for your contacts to move through for individualized marketing experiences
- Locate and use insights and reporting capabilities for all your marketing initiatives
- Configure social media posting and management
- Learn about the multiple types of template options to begin building marketing content faster
- Understand configuration and administration options in Dynamics 365 Marketing
- Understand GDPR Policies and how they affect marketing and the GDPR features included within the application





DAY 01



DAY 02



DAY 03

## CONCEPTS & BASICS

### Dynamics 365 Marketing Overview

- Key Terminology & Course Overview
- Overview of Microsoft Dynamics 365 Marketing

### Navigation and Key Terminology

- Sitemap
- Area
- Record Types & Ownership
- Views
- Forms
- Quick Create
- Activities
- Dashboards
- Terminology: Accounts/Contacts/Leads

### Marketing Data Management

- Importing Data
- Working with Data Templates
- Exporting Data

### Marketing Content Management

- Image Management
- Video Management
- Keyword Management
- Content Blocks

## DIGITAL MARKETING CONTENT

### Digital Marketing Content

- Overview & Designer Tools

### Forms

- Overview & Form Types
- Form Statuses
- Record Update Settings
- Form Fields
- Pre-Filling Forms
- Form Submissions & Insights

### Pages

- Overview & Page Types
- Page Creation Process
- Statuses
- Page Uses
- Page Submissions and Insights

### Subscription Center

- Definition & Uses
- Subscription List Management

### Emails

- Legal Designations
- Email Creation Process
- Dynamic Content & Assist Edit Feature
- Preview & Test Sends
- Error, Accessibility, & Spam Checkers
- A/B Testing
- Email Insights & Best Practices

### Segments

- Types
- Designer Overview
- Block types



DAY 01



DAY 02



DAY 03

## LEADS & SCORING

### Lead Lifecycle Overview

- Contacts, Accounts, & Leads
- Marketing to Sales Pipeline
- B2B – Account Based Marketing
- Lead Generation
- Lead Matching Strategies

### Lead Scoring Feature

- Prerequisites & Requirements
- Lead Score Components
- Grades
- Sales Ready Scores

## CUSTOMER JOURNEY

- Overview
- Inbound vs. Outbound
- Customer Journey Designer
- Templates
- Tiles
- Settings
- Insights

## REAL-TIME MARKETING

- Overview
- Real-Time Triggers
- Work with Segments
- Asset Library
- Create:
  - emails
  - push notifications
  - text messages

## OTHER MARKETING RECORDS

### Social Media Posts

- Calendar
- Draft and Schedule
- Posts
- Configuration

### Marketing Templates

- Management
- Creation
- Tags



DAY 01



DAY 02



DAY 03

## EVENT MANAGEMENT

### Onsite Event Management

- Event Overview
- Event Records
  - Sessions
  - Speakers
  - Sponsorships
  - Event Logistics
- Registrations, Check-Ins, and Results
- Event Website

### Webinar Event Management

- Webinar Overview
- Create a Webinar
- Webinars using Microsoft Teams

## CUSTOMER VOICE

### Customer Voice Overview

- Create a Project
- Create a Survey
- Sending Surveys
- Embed surveys in your website

## ADMINISTRATION SETTINGS

### Marketing Settings

- Versions
- What's New
- Updates
- Quota Limits
- Feature Switches

### Privacy and GDPR Compliance

- GDPR Resources
- GDPR Features in Marketing

### Email Marketing Settings

- Domain Authentication
- Landing Pages
- Matching Strategies
- Designer Feature Protection
- Default Content Settings
- Double Opt-In
- Microsoft Email Policies

### Data Management

- Analytics Configuration
- Dataset Configuration





Dynamics 365 University is designed to be **foundational training for those responsible for implementing and supporting Dynamics 365** within your organization. Dynamics 365 University focuses on out-of-the-box features and functionality **training for your core team**. Participants get an understanding of how the Dynamics 365 processes and architecture can be leveraged and customized to **support your unique organizational processes**.

GET STARTED