



coffee + DUNN

MICROSOFT DYNAMICS 365 FOR MARKETING

EVERYTHING YOU NEED TO KNOW ABOUT GETTING CERTIFIED

Table of Contents

Helpful Links	2
Skills Measured	2
Sign Up for a Trial Environment	6
Recommended Exercises	6
Setup Configuration Guide	7

Helpful Links

1. Microsoft Dynamics 365 for Marketing – [Help & training](#)
2. Microsoft Dynamics 365 for Marketing – [User guide](#)
3. Microsoft Dynamics 365 for Marketing BOM assets on [MPN](#)
4. Microsoft Dynamics 365 for Marketing – [Overview Demo](#)
5. Microsoft Dynamics 365 for Marketing – [Lead scoring information](#)
6. Microsoft Dynamics 365 for Marketing – [Marketing to leads “how-to”](#)
7. Microsoft Dynamics 365 for Marketing – [Keep marketing up-to-date guide](#)
8. Microsoft Dynamics 365 for Marketing update – [Read-me](#)

Skills Measured

1. Set up and configure Microsoft Dynamics 365 for Marketing (10-15%)
 - a. **Set up Microsoft Dynamics 365 for Marketing**
Perform initial set up steps; configure organizational, business management, and customization settings; define default matching strategies, view quota limits
 - b. **Configure other settings**
Configure event settings; configure Customer Insights synchronization; upload images to file storage; view and manage keywords for an organization; create templates including activity templates
 - c. **Manage data quality and privacy**
Identify GDPR rules for individuals and organizations; identify how Microsoft Dynamics 365 supports GDPR; configure permission-based marketing; track online behavior; manage email unsubscribe requests; manage data imports and deduplication
 - d. **Integrate Microsoft Dynamics 365 for Marketing with other services**
Integrate with the Customer Insights service; use Power BI to view Microsoft Dynamics 365 for Marketing data; identify how custom channels work with Microsoft Dynamics 365 for Marketing

Helpful links:

- <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/marketing/purchase-setup>
- https://mva.microsoft.com/en-us/training-courses/introduction-to-microsoft-dynamics-365-for-marketing-18403?l=rv3ZAvTLF_1805368485

2. Manage segments and lists (10-15%)

a. Create and manage segments

Identify segment types; create market segments including dynamic, static, and suppression segments; implement segment naming rules; view segment entities and relationships by using the Explore hyperlink; configure dynamic segments by using the Designer; combine segments using union, exclude, or intersect logic

Helpful Links:

- <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/marketing/segmentation-lists-subscriptions>
- https://mva.microsoft.com/en-us/training-courses/introduction-to-microsoft-dynamics-365-for-marketing-18403?l=NwEgpOFIF_1106312570
- <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/marketing/create-segment>

b. Create and manage subscription centers and lists

Identify usage scenarios for subscription lists; create a subscription list; add a subscription list to a form; create a segment based on a subscription list

Helpful Link:

- <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/marketing/set-up-subscription-center>

3. Create and manage marketing forms and pages (10-15%)

a. Create marketing forms

Identify types of marketing forms; identify form requirements and limitations; create a marketing form by using a template; create landing page forms, subscription centers, and Forward to a Friend pages

Helpful Link:

- <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/marketing/marketing-forms>

b. Create and manage marketing pages

Create marketing pages; add form blocks to marketing pages; add forms to form blocks; style marketing pages; integrate marketing pages; create and use dynamic tests links; implement dedicated marketing page blocks; preview and validate marketing pages; publish a marketing page

Helpful Link:

- <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/marketing/create-deploy-marketing-pages>

4. Manage leads (10-15%)

a. Create and manage leads

Identify and describe stages in the lead life cycle; create leads manually or automatically; synchronize leads from LinkedIn by using the LinkedIn connector; create segments by using Microsoft Dynamics Customer Insights integration

Helpful Link:

- <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/marketing/market-to-leads>

b. Assess sales readiness

Create fixed rule and behavior rule scoring conditions; create compound conditions; set up single and multiple condition models; configure advanced lead scoring; configure sales readiness thresholds; review lead conversion metrics

Helpful Link:

- <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/marketing/score-manage-leads>

5. Create and manage marketing emails (10-15%)

a. Create email messages

Create an email message by using a template; use basic HTML markup to create email messages; identify mandatory dynamic fields; add dynamic content to email messages

Helpful Links:

- <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/marketing/create-marketing-email>
- <https://www.youtube.com/watch?v=05FvnxGI6y8>
- https://mva.microsoft.com/en-us/training-courses/introduction-to-microsoft-dynamics-365-for-marketing-18403?l=7aGTnPFIF_6306312570

b. Publish and manage email messages

Identify message requirements; preview messages by using the Basic and Inbox options; validate messages; publish messages

Helpful Links:

- <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/marketing/prepare-marketing-emails#process-overview-how-to-create-and-go-live-with-a-marketing-email>

6. Manage customer journeys (10-15%)

a. Create journeys

Identify and describe journey template types; identify content types; set up a customer journey; implement Activity and Launch Workflow options; implement targets; identify flow control components; implement flow control for journeys

Helpful Links:

- <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/marketing/create-simple-customer-journey>

b. Publish and manage journeys

Configure required options for publishing journeys; check campaigns for errors; publish a campaign; display customer journey insights

Helpful Links:

- <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/marketing/customer-journeys-create-automated-campaigns>

7. Manage events (5-10%)

a. Create events and webinars

Create an event team; set up sessions, including internal and external tracks; set up speakers; create event passes; set up venues; manage sponsors; manage vendors, logistics, and accommodations; identify webinar types; configure webinar options

Helpful Links:

- <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/marketing/set-up-event>
- <https://blogs.technet.microsoft.com/lystavlen/2018/02/23/event-management-in-dynamics-365-for-marketing-quick-start-guide/>

b. Manage webinars

Configure the event portal; create event invitations, banners, and social media posts; register and check in attendees; gather event feedback; review events

Helpful Links:

- <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/marketing/set-up-webinar>

8. Create and distribute surveys (5-10%)

a. Create surveys

Create a theme and upload images; add pages to a survey and personalize data; identify survey question types; add survey questions; identify respondent types; configure responsive routing

Helpful Link:

- <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/voice-of-customer/plan-survey>

b. Preview, test, and publish surveys

Add surveys to emails; add surveys to customer journeys; clone, import, and translate surveys

Helpful Link:

- <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/voice-of-customer/distribute-survey>

c. Manage survey responses

Interpret survey results; identify report types; run reports; view data in the survey dashboard; create leads from surveys

Helpful Link:

- <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/voice-of-customer/analyze-survey-data>

Sign Up for a Trial Environment

The Microsoft Dynamics 365 for Marketing trial is free of charge to you. To sign up for a trial environment:

- Your Dynamics 365 (online) must be version 9.0 or higher
- You will receive a trial a trial Dynamics 365 instance along with your Marketing trial
- You can install one Marketing trial per Office 365 tenant
- Make sure you are in a country/ region where the product is supported

For more information on how to set up your trial environment please view Microsoft's [trial setup guide](#) or you can learn more through [this video](#).

Recommended Exercises

1. Set up and configure Microsoft Dynamics 365 for Marketing
 - a. System navigation
 - b. Verify Advanced Settings – check each setting and understand how they function
 - c. Understand GDPR rules and different ways you can customize Microsoft Dynamics 365 for Marketing to perform permission-based marketing
2. Manage segments and lists
 - a. Create a static segment. Use filter to find contacts and add them into segment
 - b. Create a dynamic segment. Use Flow to exclude contacts who live in TX
 - c. Create two subscription lists. Then, build a subscription form and page
3. Create and manage marketing forms and pages
 - a. Create a marketing form using a template and include the following fields: First name, Last name, Email (required), City, State, and Country. Verify mapping is done correctly. Design the marketing form and save it as a template. Publish the marketing form
 - b. Create a marketing page using a template and include the marketing form you created from the previous exercise. Publish the marketing page

4. Manage leads

- a. Navigate to the marketing page you created from the previous exercise (if not, open any published marketing page). Submit a page using a real contact and email address (make sure to use a new contact). View the contact information in the system
- b. Create a lead scoring model and understand the two different tiles used to create that lead scoring model

5. Create and manage marketing emails

- a. Create an email message using a template. Style the email message. Include the subscription center and physical mailing address using assist edit. If already existing, re-link the subscription center and physical mailing address using assist edit. View both in preview and Inbox preview. Check for errors and publish the email message

6. Manage customer journeys

- a. Create and publish a simple email send customer journey
- b. Create and publish an inbound customer journey – start with Marketing Page
- c. Navigate to a published customer journey's Insights

7. Manage events

- a. Create an in-person event. Add venues, speakers, and lodging information
- b. Navigate to the event portal of an active event record. Submit an event registration form. Verify you can view your registration information on the event record

8. Create and distribute surveys

- a. Navigate to Voice of the Customers. Create a survey. Include at least 5 different question types. Publish the survey
- b. Submit the survey you created in the previous exercise (if not, select a published survey)
- c. Navigate to the Insights of the survey you submitted. Interpret the survey. Run a report. Export the survey results

Setup Configuration Guide

[Download here](#)