

MB-MB7005: CREATE AND MANAGE JOURNEYS WITH DYNAMICS 365 CUSTOMER INSIGHTS



DURATION	LEVEL	TECHNOLOGY	DELIVERY METHOD	TRAINING CREDITS
1 Day	Intermediate	Dynamics	Instructor-led	NA

INTRODUCTION

In this learning path, you practice building journeys using Dynamics 365 Customer Insights. The skills validated include creating marketing assets like emails, creating a segment, creating a journey, adding elements to a journey, and publishing the journey.

AUDIENCE PROFILE

This course is designed for individuals who are already familiar with Dynamics 365 Customer Insights. The ideal audience includes those interested in running marketing campaigns and understanding basic marketing principles.

PREREQUISITES

You should be familiar with the basic features of Dynamics 365 Customer Insights and how to configure them.

COURSE OBJECTIVES

This course focuses on equipping learners with skills to design and optimize customer journeys. Key objectives include:

- Creating and publishing marketing emails with personalized content.
- Building real-time customer journeys using segments and triggers.
- Setting business goals and tracking journey progress effectively.
- Utilizing A/B testing and AI-driven channel optimization.
- Managing images and content for campaigns.
- Automating workflows and integrating journeys with other tools.

COURSE CONTENT

Module 1: Create emails in Dynamics 365 Customer Insights - Journeys

This module covers emails, assets, and personalization in the real-time work area of Dynamics 365 Customer Insights - Journeys.

Lessons

- Introduction
- Manage assets
- Create marketing emails
- Personalize content
- Use brand profiles
- Use Copilot to generate email content ideas
- Style emails with AI-assisted themes
- Create content blocks
- Preview and test emails
- Check your message for errors and publish
- Send emails without building a journey
- Edit a live email
- Prevent sending emails to duplicated email addresses
- Check your knowledge
- Summary

In this module, you will:

- Upload images to the file library and use images in marketing content.
- Create and publish an email.
- Enhance your emails by using personalization, content blocks, content ideas, and more.
- Upload images to the file library and use images in marketing content.
- Add personalization to emails.

Module 2: Build journeys with Dynamics 365 Customer Insights - Journeys

This module covers segments, triggers, and journeys within the real-time work area of Dynamics 365 Customer Insights - Journeys.

Lessons

- Introduction
- Create and manage segments
- Work with triggers
- Create a journey
- Add messages to the journey
- Add activities to the journey

- Add other elements to the journey
- Publish journeys
- Check your knowledge
- Summary

In this module, you will:

- Manage segments in real-time journeys.
- Work with triggers in real-time journeys.
- Create a journey.
- Set a business goal and measure progress through a journey.
- Determine when to use attribute versus if/then branches.
- Use an A/B test within the customer journey.
- Use AI-driven, run-time channel optimization.
- Raise triggers from a journey to run another journey or Power Automate flow.

Module 3: Guided project - Create and manage journeys

with Dynamics 365 Customer Insights

In this module, practice building journeys in Customer Insights, including creating assets, building a segment, and creating a segment-based or trigger-based journey.

This lab offers interactive practice with real-world scenarios for business-specific challenges.

Lessons

- Introduction
- Prepare for the guided project
- Exercise - Create emails
- Exercise - Create a segment
- Exercise - Create a segment-based journey
- Exercise - Create a trigger-based journey

- Knowledge check
- Summary

In this module, you will:

- Create a marketing email
- Create a segment
- Build a segment-based journey
- Build a trigger-based journey

ASSOCIATED CERTIFICATIONS & EXAM

There is no Associated Certifications or Exam for this course.