



Create and manage journeys with Dynamics 365 Customer Insights (MB-7005)

ID MB-7005 Price on request Duration 1 day

Prerequisites

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

Course Content

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.

- 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

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.

- 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

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.

- 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

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