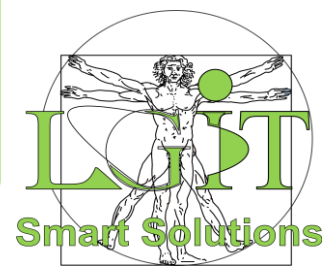


Dynamics 365 Customer Service: MB-230T01



Course Overview

Microsoft Dynamics Customer 365 Service offers any organization an opportunity for customer success. Using tools such as automatic case creation and queue management frees up your time to dedicate it where you can have a greater impact, directly with your customers. Join our team of globally recognized experts as they take you step by step from creating cases to interacting with customers to resolving those cases. Once you've resolved those cases you can learn from data analysis the key details to help you resolve similar cases faster or avoid new issues altogether.

Audience Profile

A Dynamics 365 Customer Engagement Functional Consultant is responsible for performing discovery, capturing requirements, engaging subject matter experts and stakeholders, translating requirements, and configuring the solution and applications. The Functional Consultant implements a solution using out of the box capabilities, codeless extensibility, application, and service integrations.

Skills gained

- Configure advanced settings
- Manage marketing content, templates, and integrations
- Create and manage leads
- Design and create marketing forms and pages
- Create and manage segments
- Set up and launch customer journeys
- Create and manage events
- Distribute and analyse surveys
- Prerequisites
- Knowledge of the Dynamics 365 platform and an understanding of basic marketing principles. Power Platform experience, especially in model-driven applications, is also recommended.

Prerequisites

This course is designed for functional consultants working with Dynamics 365 Customer Service, or functional consultants who work with other Dynamics 365 apps who want to expand their knowledge of Customer Service

Duration: 24 Hours (8 x 3hrs)

Course Outline

Module 1: Configure Dynamics 365 Marketing

In this module, you will learn about setting up your Marketing instance and configuring advanced settings.

Lessons

Set up and manage Dynamics 365 Marketing

- Configure marketing settings

Module 2: Manage segments and lists

This module will review how to create, manage, and use segments and subscription centers.

Lessons

Create and manage segments

- Create and manage subscription centers and lists.

Module 3: Manage marketing forms and pages

This module will cover how to create marketing forms and pages.

Lessons

- Manage forms
- Manage marketing pages

Module 4: Manage leads, accounts, and contacts

This module will cover how to manage customers as accounts or contacts, and how to nurture them through the lead lifecycle.

Lessons

Create and manage leads

- Manage accounts and contacts

Module 5: Manage marketing emails, customer journeys, and real-time marketing

This module will cover how to create email messages and customer journeys in Dynamics 365 Marketing.

Lessons

Create marketing emails

- Create customer journeys
- Manage content, event triggers and journeys in real-time marketing

Module 6: Manage events

This module will review the customer journey creation process.

Lessons

Create an event

- Create a webinar event
- Promote and manage events

Module 7: Create surveys with Dynamics 365 Customer Voice

This module will demonstrate how to create and distribute surveys to customers.

Lessons

Create a survey project

- Create surveys with Dynamics 365 Customer Voice
- Send Dynamics 365 Customer Voice surveys

Module 8: Analyze insights in Dynamics 365 Marketing

In this module, you will learn about using insights functionality to view and analyze data related to your marketing initiatives.

Lessons

- Evaluate marketing initiatives with analytics