



# CREATE AND MANAGE JOURNEYS WITH DYNAMICS 365 CUSTOMER INSIGHTS (MB-7005)

Course Code: 834082

In this course, 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.

## Who Needs to Attend

This course is designed for Business Analyst and Functional Consultant roles.

## Prerequisites

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

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CLASSROOM LIVE

\$675 CAD

1 Day

## Classroom Live Outline

### **Module 1: Create emails in 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

### **Module 2: Build journeys with 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

### **Module 3: Guided project - Create and manage journeys with Dynamics 365 Customer Insights**

- 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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VIRTUAL CLASSROOM LIVE

\$675 CAD

1 Day

## Virtual Classroom Live Outline

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- 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

### **Module 2: Build journeys with 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
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- 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

Sep 4 - 4, 2025 | 9:00 AM - 5:00 PM EDT

Nov 25 - 25, 2025 | 9:00 AM - 5:00 PM EST



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PRIVATE GROUP TRAINING

1 Day

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