

# MB-7005: Create and manage journeys with Dynamics 365 Customer Insights

**Course Duration: 8 Hours**

**Course code: MB-7005**

## 1. Course Overview

The MB-7005: Create and Manage Journeys with Dynamics 365 Customer Insights course provides participants with the knowledge and skills needed to design, configure, and optimize customer journeys using Dynamics 365 Customer Insights – Journeys. This course covers audience segmentation, personalization, automation, and performance analysis to help you deliver impactful, data-driven customer experiences. By the end of the training, you will be able to manage multi-channel customer journeys and enhance customer engagement strategies effectively.

## 2. What you'll learn?

By the end of this course, you will be able to:

- Understand the capabilities and features of Dynamics 365 Customer Insights – Journeys.
- Create, configure, and manage personalized customer journeys.
- Build and manage audience segments based on customer data.
- Use triggers, automation, and scheduling to streamline marketing workflows.
- Integrate multiple channels (email, SMS, events, and more) into journeys.
- Monitor, analyze, and improve customer journey performance using analytics.

## 3. Target Audience

This course is ideal for:

- Marketing professionals and campaign managers.
- CRM administrators and consultants.
- Business analysts involved in customer engagement projects.
- Dynamics 365 users who want to enhance marketing automation skills.

## 4. Pre-Requisites

Learners should have:

- A basic understanding of Dynamics 365 applications and navigation.
- Knowledge of marketing concepts and customer engagement strategies.
- Familiarity with data segmentation and CRM processes (recommended but not mandatory).

## 5. Course content

### **Module 1: Introduction to Dynamics 365 Customer Insights – Journeys**

- Overview of Customer Insights and its role in marketing automation
- Understanding the Customer Data Platform (CDP) and connected apps

### **Module 2: Creating and Managing Customer Journeys**

- Setting up journeys from templates and scratch
- Configuring triggers, actions, and audience targeting
- Multi-channel journey orchestration (email, SMS, push notifications, events)

### **Module 3: Audience Segmentation and Personalization**

- Building static and dynamic segments
- Personalizing messages with dynamic content
- Leveraging customer data for targeted communication

## **Module 4: Automation and Workflow Optimization**

- Scheduling journeys and managing time-based triggers
- Automating repetitive marketing tasks
- Using suppression rules and compliance settings

## **Module 5: Performance Tracking and Analytics**

- Monitoring journey metrics and KPIs
- Analyzing customer engagement patterns
- Improving journeys using insights and reporting

## **Module 6: Best Practices and Advanced Features**

- Journey optimization strategies
- Integration with other Dynamics 365 applications
- Troubleshooting and resolving journey issues