

Exam MB-220: Microsoft Dynamics 365 Marketing – Skills Measured

This exam was updated on July 9, 2021. Following the current exam guide, we have included a version of the exam guide with Track Changes set to “On,” showing the changes that were made to the exam on that date.

Audience Profile

Candidates for this exam are Microsoft Dynamics 365 Marketing Functional Consultants. Candidates are responsible for implementing solutions that attract and convert leads, build brand awareness, standardize omnichannel messaging, and deliver marketing insights.

Candidates are responsible for configuring and expanding the core marketing application to include email marketing, setup, interactive customer journeys, leads nurturing with personalized experiences, LinkedIn integration, Events, surveys, Landing Pages, segmentation and scoring, and maintaining General Data Protection Regulation (GDPR) compliance.

Candidates should have some knowledge of marketing principles and the Marketing application's role in relationship to the Dynamics 365 suite of applications, including integration with Dynamics 365 and Microsoft 365 applications. Candidates should understand industry terminology, priorities, common initiatives, standards, methodologies, and best practices.

Skills Measured

NOTE: The bullets that follow each of the skills measured are intended to illustrate how we are assessing that skill. This list is NOT definitive or exhaustive.

NOTE: Most questions cover features that are General Availability (GA). The exam may contain questions on Preview features if those features are commonly used.

Configure marketing applications (20-25%)

Configure organization settings

- configure administration settings including LinkedIn Lead Gen and quota limits
- configure data sources for synchronization
- create and manage templates
- configure portal integration
- configure landing page settings
- configure domain authentication

- configure data protection tools
- configure social media
- configure webinar providers

Configure marketing settings

- configure matching strategies
- configure marketing email settings
- configure customer journey settings
- configure opt-in settings
- configure email deduplication settings
- configure lead scoring settings
- configure required options for publishing journeys
- create and configure marketing calendars
- manage assets and content settings

Manage insights

- analyze contact insights
- analyze lead insights
- analyze segment insights
- analyze customer journey insights
- analyze email insights
- analyze lead scoring model insights
- analyze marketing page insights
- analyze marketing form insights
- analyze website insights
- analyze redirect URL insights

Manage segments and lists (10-15%)

Create and manage segments

- determine segment type
- create market segments
- create segments using Natural Language Query
- configure dynamic segments using Designer
- combine segments using union, exclude, or intersect logic
- create segments from external sources using customer insights

Create and manage subscription centers and lists

- determine usage scenarios for subscription lists
- create a subscription list

- add a subscription list or lists to a form
- create a segment based on a subscription list
- create a subscription center marketing page
- understand how and where to publish subscription centers

Create and manage marketing forms and pages (10-15%)

Create marketing forms

- determine which marketing form type to use
- determine form requirements and limitations
- create a marketing form using a template
- create landing forms and pages

Create and manage marketing pages

- create marketing pages
- add content to marketing pages
- add forms to content blocks
- apply a style to marketing pages
- integrate marketing pages with marketing emails
- preview and validate marketing pages
- publish marketing pages
- monitor visitors to marketing pages

Manage leads, contacts, and accounts (5-10%)

Create and manage leads

- create leads
- synchronize leads from LinkedIn

Create and manage accounts and contacts

- create and manage accounts
- create and manage contacts
- manage activities

Create and manage marketing emails (5-10%)

Create email messages

- create an email message by using a template
- define mandatory fields for email messages

- add dynamic content to email messages

Manage email messages

- define message requirements
- preview messages by using the Basic and Inbox options
- check Spam Scores
- design and run A/B tests on email messages
- validate and publish messages

Manage customer journeys (10-15%)

Create customer journeys

- determine content types required for a customer journey
- create a customer journey by using a template
- implement actions
- implement targets
- implement flow control for customer journeys

Publish and manage customer journeys

- configure required options for publishing journeys
- check customer journeys for errors
- publish a customer journey

Manage events and webinars (10-15%)

Create and configure events and webinars

- create an event team
- set up venues and sessions including internal and external tracks
- set up speakers
- configure webinar options
- configure event website
- create and manage event forms
- create stream events on Microsoft Teams
- set up event agenda

Manage events and webinars

- create event invitations, banners, and social media posts
- manage event registrations, including attendee check-in
- manage speakers, registration, waitlists, and attendees

- manage sponsors, vendors, logistics, and accommodations
- record and view financial information for events

Configure Dynamics 365 Customer Voice (10-15%)

Create surveys

- create a theme and upload images
- add pages to a survey and personalize data
- identify survey question types
- add survey questions
- determine respondent types
- determine submission options

Preview, test, and publish surveys

- add surveys to emails
- add surveys to a webpage
- add surveys to customer journeys
- clone, import, and translate surveys

Manage survey responses

- view a summary of survey results
- analyze survey responses
- implement conditional logic for survey actions

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- [create a subscription center marketing page](#)
- [understand how and where to publish subscription centers](#)

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- create and manage contacts
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Manage email messages

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- preview messages by using the Basic and Inbox options
- [check Spam Scores](#)
- [design and run A/B tests on email messages](#)
- validate and publish messages
- ~~[manage Subscription Center](#)~~

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- configure event website
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- [set up event agenda](#)

Manage events and webinars

- create event invitations, banners, and social media posts
- ~~register and check in~~ [Manage event registration, including attendees check-in.](#)
- manage speakers, registration, waitlists, and attendees
- manage sponsors, vendors, logistics, and accommodations
- [record and view financial information for events](#)

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