

Study guide for Exam MB-220: Microsoft Dynamics 365 Marketing Functional Consultant

Purpose of this document

This study guide should help you understand what to expect on the exam and includes a summary of the topics the exam might cover and links to additional resources. The information and materials in this document should help you focus your studies as you prepare for the exam.

Useful links	Description
Review the skills measured as of March 23, 2023	This list represents the skills measured AFTER the date provided. Study this list if you plan to take the exam AFTER that date.
Review the skills measured prior to March 23, 2023	Study this list of skills if you take your exam PRIOR to the date provided.
Change log	You can go directly to the change log if you want to see the changes that will be made on the date provided.
How to earn the certification	Some certifications only require passing one exam, while others require passing multiple exams.
Certification renewal	Microsoft associate, expert, and specialty certifications expire annually. You can renew by passing a free online assessment on Microsoft Learn.
Your Microsoft Learn profile	Connecting your certification profile to Learn allows you to schedule and renew exams and share and print certificates.
Passing score	A score of 700 or greater is required to pass.
Exam sandbox	You can explore the exam environment by visiting our exam sandbox

Useful links	Description
Request accommodations	If you use assistive devices, require extra time, or need modification to any part of the exam experience, you can request an accommodation.
Take a practice test	Are you ready to take the exam or do you need to study a bit more?

Updates to the exam

Our exams are updated periodically to reflect skills that are required to perform a role. We have included two versions of the Skills Measured objectives depending on when you are taking the exam.

We always update the English language version of the exam first. Some exams are localized into other languages, and those are updated approximately eight weeks after the English version is updated. While Microsoft makes every effort to update localized versions as noted, there may be times when the localized versions of an exam are not updated on this schedule. Other available languages are listed in the **Schedule Exam** section of the **Exam Details** webpage. If the exam isn't available in your preferred language, you can request an additional 30 minutes to complete the exam.

Note

The bullets that follow each of the skills measured are intended to illustrate how we are assessing that skill. Related topics may be covered in the exam.

Note

Most questions cover features that are general availability (GA). The exam may contain questions on Preview features if those features are commonly used.

Skills measured as of March 23, 2023

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 the core marketing application to include segmentation, email marketing, interactive customer journeys and real-time journeys, lead nurturing with personalized experiences, events, surveys, lead scoring, analytics, and maintaining compliance with data privacy and security regulations.

Candidates should have some knowledge of marketing principles and the Dynamics 365 Marketing application's role in relationship to the Dynamics 365 suite of applications, including integration of the Microsoft Power Platform, other Dynamics 365 customer engagement apps, Dynamics 365 Customer

Insights, Dynamics 365 Customer Voice, Microsoft Teams, and other Microsoft 365 applications. Candidates should understand industry terminology, priorities, common initiatives, standards, methodologies, and best practices.

- Configure marketing applications (15–20%)
- Manage segments and lists (10–15%)
- Create and manage marketing forms and pages (5–10%)
- Manage leads, contacts, and accounts (5–10%)
- Create and manage marketing email messages (10–15%)
- Manage customer journeys (20–25%)
- Manage events and webinars (10–15%)
- Configure Dynamics 365 Customer Voice (5–10%)

Configure marketing applications (15–20%)

Configure the Dynamics 365 Marketing app

- Create and configure forms
- Create and configure views
- Create and configure charts
- Create and configure dashboards
- Configure site maps

Configure organization settings

- Configure data sources for synchronization
- Create and manage templates
- Configure integration with the marketing portal
- Configure landing page settings
- Configure domain authentication
- Configure social media accounts
- Configure webinar providers
- Configure LinkedIn Lead Gen
- Configure the Customer Insights connector
- Configure SMS providers
- Configure push notifications
- Describe Teams integration

Configure and manage marketing settings

- Configure matching strategies
- Configure marketing email settings
- Configure customer journey settings
- Configure opt-in settings

- Configure lead scoring settings
- Configure required options for publishing journeys
- Create and configure marketing calendars
- Configure content settings
- Configure compliance settings
- Manage marketing content libraries

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
- Analyze event insights

Manage segments and lists (10–15%)

Create and manage segments

- Determine segment type
- Create and manage marketing segments
- Create and manage templates
- Create segments using Natural Language Query
- Configure dynamic segments using the Designer
- Combine segments using union, exclude, or intersect logic
- Create segments from external sources by using Dynamics 365 Customer Insights
- Describe use cases for blocks including behavioral blocks and query blocks

Create and manage subscription centers and lists

- Create a subscription list
- Add a subscription list or lists to a form
- Create a segment based on a subscription list
- Describe use cases for subscription centers
- Create and manage a subscription center
- Describe when to use marketing lists and subscription lists
- Describe use cases for suppression lists

Create and manage marketing forms and pages (5–10%)

Create and manage marketing forms

- Determine which marketing form type to use
- Identify form requirements and limitations
- Create a marketing form by using a template
- Manage form templates
- Create and manage marketing forms
- Configure marketing form fields
- Embed forms in external websites
- Implement form capture for externally managed forms

Create and manage marketing pages

- Create and configure marketing pages and templates
- Add outbound content blocks to marketing pages
- Add marketing forms to marketing pages
- 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
- Describe personalized marketing pages

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

Manage leads

- Create leads
- Manage the leads lifecycle
- Synchronize leads from LinkedIn Campaign Manager by using LinkedIn Lead Gen
- Create and manage lead scoring models

Create and manage accounts and contacts

- Create and manage accounts
- Create and manage contacts
- Manage marketing consent settings
- Create and manage activities and activity templates

Create and manage marketing email messages (10–15%)

Create email messages

- Create and manage marketing email and templates

- Describe the HTML editor feature in a marketing email
- Create and use reusable outbound content blocks
- Define mandatory fields for email messages
- Add dynamic content to email messages
- Add conditional content to email messages
- Validate email content for compliance by using the Accessibility Checker
- Check spam scores for messages by using Spam checker
- Personalize using predefined tokens

Manage email messages

- Define message requirements
- Preview messages by using basic, inbox, Litmus features
- Configure A/B testing and review test results
- Validate and publish email messages

Manage customer journeys (20–25%)

Create automated campaigns by using outbound customer journeys

- Create and manage customer journey templates
- Determine when to use an inbound or outbound customer journey
- Determine content types required for a customer journey
- Create a customer journey by using a template
- Set the target audiences
- Configure Smart Scheduler
- Describe business unit scoping for segments and customer journeys
- Add segments and suppression lists to a customer journey
- Configure recurring journeys

Publish and manage customer journeys

- Configure required options for publishing journeys
- Check customer journeys for errors
- Publish a customer journey

Configure and manage real-time journey orchestration

- Determine whether to use real-time or outbound journey orchestration
- Describe the real-time marketing asset library
- Enable real-time customer journey orchestration
- Create a real-time journey
- Configure real-time journey triggers
- Configure real-time email templates
- Configure automated SMS keyword flows

- Configure push notifications
- Measure campaign effectiveness with built-in analytics
- Create content blocks in real-time marketing

Manage events and webinars (10–15%)

Create and configure events and webinars

- Create an event
- Configure an event as a Microsoft Teams webinar
- Configure an event as a Microsoft Teams Live event
- Configure buildings, rooms, and layouts for events
- Set up sessions including internal and external tracks
- Set up speakers
- Configure event websites
- Create and manage event forms
- Configure event agenda
- Describe the event business process flow

Manage events

- Create event invitations, banners, and social media posts
- Manage event registrations (including attendee check-in) and cancellations
- Manage speakers, registration, waitlists, and attendees
- Manage sponsors, vendors, logistics, and accommodations
- Record and view financial information for events
- Configure event capacity and passes

Configure Dynamics 365 Customer Voice (5–10%)

Create surveys

- Create and manage Customer Voice surveys
- Apply design elements to a survey
- Define satisfaction metrics

Manage surveys

- Embed surveys in marketing email messages
- Add surveys to a webpage
- Add surveys to customer journeys
- View survey responses in Customer Voice
- Create a segment from survey responses

Study resources

We recommend that you train and get hands-on experience before you take the exam. We offer self-study options and classroom training as well as links to documentation, community sites, and videos.

Study resources	Links to learning and documentation
Get trained	Choose from self-paced learning paths and modules or take an instructor led course
Find documentation	Dynamics 365 documentation and learning modules Dynamics 365 Marketing
Ask a question	Microsoft Q&A Microsoft Docs
Get community support	Microsoft Dynamics Community
Follow Microsoft Learn	Microsoft Learn - Microsoft Tech Community

Change log

Key to understanding the table: The topic groups (also known as functional groups) are in bold typeface followed by the objectives within each group. The table is a comparison between the two versions of the exam skills measured and the third column describes the extent of the changes.

Skill area prior to March 23, 2023	Skill area as of March 23, 2023	Changes
Audience profile		Minor
Configure marketing applications	Configure marketing applications	No change
Configure model-driven apps	Configure the Dynamics 365 Marketing app	Minor
Configure organization settings	Configure organization settings	Minor
Configure and manage marketing settings	Configure and manage marketing settings	Minor
Manage insights	Manage insights	Minor
Manage segments and lists	Manage segments and lists	No change
Create and manage segments	Create and manage segments	Minor

Skill area prior to March 23, 2023	Skill area as of March 23, 2023	Changes
Create and manage subscription centers and lists	Create and manage subscription centers and lists	No change
Create and manage marketing forms and pages	Create and manage marketing forms and pages	No change
Create and manage marketing forms	Create and manage marketing forms	Minor
Create and manage marketing pages	Create and manage marketing pages	Minor
Manage leads, contacts, and accounts	Manage leads, contacts, and accounts	No change
Manage leads	Manage leads	Minor
Create and manage accounts and contacts	Create and manage accounts and contacts	Minor
Create and manage marketing email messages	Create and manage marketing email messages	No change
Create email messages	Create email messages	Major
Manage email messages	Manage email messages	No change
Manage customer journeys	Manage customer journeys	No change
Create automated campaigns by using outbound customer journeys	Create automated campaigns by using outbound customer journeys	Minor
Publish and manage customer journeys	Publish and manage customer journeys	Minor
Configure and manage real-time journey orchestration	Configure and manage real-time journey orchestration	Minor
Manage events and webinars	Manage events and webinars	No change
Create and configure events and webinars	Create and configure events and webinars	Minor
Manage events	Manage events	Minor
Configure Dynamics 365 Customer Voice	Configure Dynamics 365 Customer Voice	No change
Create surveys	Create surveys	Major
Manage surveys	Manage surveys	Minor

Skills measured prior to March 23, 2023

Audience profile

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Candidates are responsible for configuring the core marketing application to include email marketing, setup, interactive customer journeys and real-time journeys, leads nurturing with personalized experiences, LinkedIn integration, events, Customer Voice surveys, segmentation, scoring, and maintaining compliance with data privacy and security regulations.

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.

- Configure marketing applications (15-20%)
- Manage segments and lists (10-15%)
- Create and manage marketing forms and pages (5-10%)
- Manage leads, contacts, and accounts (5-10%)
- Create and manage marketing email messages (10-15%)
- Manage customer journeys (20-25%)
- Manage events and webinars (10-15%)
- Configure Dynamics 365 Customer Voice (5-10%)

Configure marketing applications (15–20%)

Configure model-driven apps

- Create and configure forms
- Create and configure views
- Create and configure charts
- Create and configure dashboards
- Configure site maps

Configure organization settings

- Configure data sources for synchronization
- Create and manage templates
- Configure integration with the marketing portal
- Configure landing page settings
- Configure domain authentication
- Configure data protection tools
- Configure social media accounts

- Configure webinar providers
- Configure LinkedIn Lead Gen
- Configure the Customer Insights connector
- Configure SMS providers
- Configure push notifications
- Configure built-in Teams chat

Configure and manage marketing settings

- Configure matching strategies
- Configure marketing email settings
- Configure customer journey settings
- Configure opt-in settings
- Configure lead scoring settings
- Configure required options for publishing journeys
- Create and configure marketing calendars
- Configure content settings
- Configure compliance settings
- Manage the asset library and files

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 and manage marketing segments
- Create and manage templates
- Create segments using Natural Language Query
- Configure dynamic segments using Designer
- Combine segments using union, exclude, or intersect logic

- Create segments from external sources by using Dynamics 365 Customer Insights
- Describe use cases for blocks including behavioral blocks and query blocks

Create and manage subscription centers and lists

- Create a subscription list
- Add a subscription list or lists to a form
- Create a segment based on a subscription list
- Describe use cases for subscription centers
- Create and manage a subscription center
- Describe when to use marketing lists and subscription lists
- Describe use cases for suppression lists

Create and manage marketing forms and pages (5–10%)

Create and manage marketing forms

- Determine which marketing form type to use
- Identify form requirements and limitations
- Create a marketing form by using a template
- Manage form templates
- Create and manage marketing forms
- Configure dynamics form fields
- Embed forms in external websites
- Implement form capture for externally managed forms

Create and manage marketing pages

- Create marketing pages
- Add content blocks to marketing pages
- Add forms to marketing pages
- 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
- Configure personalized pages
- Manage page templates

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

Manage leads

- Create leads
- Manage leads throughout the lead lifecycle

- Synchronize leads from LinkedIn Campaign Manager by using LinkedIn Lead Gen

Create and manage accounts and contacts

- Create and manage accounts
- Create and manage contacts
- Manage content settings
- Create and manage activities and activity templates

Create and manage marketing email messages (10–15%)

Create email messages

- Create and manage email templates
- Edit templates by using an HTML editor
- Create an email message by using a template
- Create and use reusable content blocks
- Define mandatory fields for email messages
- Add dynamic content to email messages
- Add conditional content to email messages
- Validate email content for compliance by using the Accessibility Checker
- Check spam scores for messages by using Spam checker
- Personalize using pre-defined tokens

Manage email messages

- Define message requirements
- Preview messages by using basic, inbox, Litmus features
- Configure A/B testing and review test results
- Validate and publish email messages

Manage customer journeys (20–25%)

Create automated campaigns by using outbound customer journeys

- Create and manage customer journey templates
- Determine when to use an inbound or outbound customer journey
- Determine content types required for a customer journey
- Create a customer journey by using a template
- Set the target audiences
- Implement Power Automate flows for customer journeys
- Configure Smart Scheduler
- Describe business unit scoping for segments and customer journeys
- Add segments and suppression lists to a customer journey
- Configure recurring journeys

Publish and manage customer journeys

- Configure required options for publishing journeys
- Check customer journeys for errors
- Publish a customer journey
- Collaborate using Teams chat

Configure and manage real-time journey orchestration

- Determine using real-time or outbound journey orchestration
- Describe the real-time marketing asset library
- Enable real-time customer journey orchestration
- Create an event-based journey
- Configure real-time event triggers
- Configure real-time email templates
- Configure automated SMS keyword flows
- Configure push notifications
- Measure campaign effectiveness with built-in analytics

Manage events and webinars (10–15%)

Create and configure events and webinars

- Create an event
- Configure an event as a Microsoft Teams webinar
- Configure an event as a Microsoft Teams Live event
- Configure buildings, rooms, and layouts for events
- Set up sessions including internal and external tracks
- Set up speakers
- Configure event websites
- Create and manage event forms
- Configure event agenda

Manage events

- 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 (5–10%)

Create surveys

- Create a project

- Select survey questions
- Apply branding to surveys and upload images
- Add sections to a survey and personalize data
- Apply branching rules to surveys
- Personalize surveys by using variables
- Determine respondent types
- Determine submission options
- Define satisfaction metrics

Manage surveys

- Add surveys to emails
- Embed surveys in marketing email messages
- Add surveys to a webpage
- Add surveys to customer journeys
- View survey responses in Customer Voice
- Create a segment from survey responses