

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

This exam was updated on May 19, 2020. 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 Dynamics 365 Customer Engagement functional consultants with Marketing expertise. 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 Office 365 applications. Candidates should understand industry terminology, priorities, common initiatives, standards, methodologies, and best practices.

Skills Measured

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

NOTE: In most cases, exams do NOT cover preview features, and some features will only be added to an exam when they are GA (General Availability).

Configure marketing applications (5-10%)

Configure marketing settings

- verify organization and business management settings
- define default matching strategies
- configure quota limits
- configure event settings
- configure Customer Insights synchronization

- manage keywords for images for an organization
- create templates
- configure the privacy banner
- configure settings for landing pages
- configure data protection tools
- configure Campaign & Materials Approval Workflow
- configure Marketing Business Units

Manage segments and lists (10-15%)

Create and manage segments

- determine segment type
- create market segments
- configure dynamic segments using Designer, Flow, or Query
- combine segments using union, exclude, or intersect logic

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 and manage Subscription Center

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
- enable prefilling for forms
- embed a form on an external website
- create new fields to add to marketing forms

Create and manage marketing pages

- determine which marketing page type to use
- create a marketing page using a template
- add form blocks to marketing pages
- customize a marketing page
- create and use dynamic test links
- implement dedicated marketing page blocks

- preview and validate marketing pages
- publish a marketing page
- configure Personalized Landing Pages

Manage leads (10-15%)

Create and manage leads

- create leads manually or automatically
- synchronize leads from LinkedIn by using the LinkedIn connector
- create and manage leads and lead segments through parent contacts/accounts
- create and manage leads through social content

Create and assess sales readiness

- create and manage Lead Scoring Models
- create explicit and implicit scoring conditions
- create compound conditions
- set up condition models
- configure thresholds

Create and manage marketing emails (10-15%)

Create email messages

- create an email message
- define mandatory fields
- add dynamic content to email messages
- integrate marketing pages with marketing emails
- create A/B Emails
- send messages through send now

Publish and manage email messages

- preview and test dynamic messages
- validate and publish messages
- edit Go live emails

Manage customer journeys (15-20%)

Create customer journeys

- determine template types
- implement content types
- set up a customer journey

- implement activity and launch workflow options
- implement targets
- implement flow control for customer journeys

Publish and manage customer journeys

- validate and publish a customer journey
- edit live customer journeys

Manage events and webinars (10-15%)

Create and manage events

- create an event team
- set up agendas, including internal and external tracks
- manage speakers, registration, waitlists, and attendees
- manage vendors, logistics, and accommodations
- manage Event Forms

Create and manage webinars

- determine webinar types
- configure webinar options

Configure and analyze customer responses (10-15%)

Create and manage Forms Pro surveys and responses

- identify survey question types
- determine respondent types
- configure response routing
- preview and test surveys
- publish surveys for customer journeys
- implement workflow conditional logic for survey actions

Manage Customer Insights

- determine report types
- 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
- gather and summarize survey results
- analyze contacts' responses in Excel

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- [create A/B Emails](#)
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Publish and manage email messages

- preview and test [dynamic](#) messages
- validate and publish messages
- [edit Go live emails](#)

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- [Manage Event Forms](#)

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