

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

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*The English language version of this exam was updated on February 28, 2022.*

*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.*

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**NOTE: Passing score: 700. [Learn more about exam scores.](#)**

## **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 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.

## **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 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 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
- 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 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 (10-15%)**

### **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
- add dynamic content by using Assist Edit

## **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 (5-10%)**

### **Create email messages**

- create and manage email templates
- edit templates by using an HTML editor
- create an email message by using a template
- define mandatory fields for email messages
- add dynamic content to email messages
- validate email content for compliance by using the Accessibility Checker
- check spam scores for messages by using Spam checker

### **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 (10-15%)**

### **Create automated campaigns by using 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
- implement actions and targets
- 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

### **Configure and manage real-time 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 the SMS channel
- configure push notifications

## **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 (10-15%)**

### **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

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*The following exam guide shows the changes that were implemented on February 28, 2022 to the English language version of the exam.*

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## **Audience Profile**

Candidates for this exam are Microsoft Dynamics 365 Marketing [f](#)Functional [c](#)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 and real-time journeys, leads nurturing with personalized experiences, LinkedIn integration, eEvents, Customer Voice surveys, Landing Pages, segmentation, and scoring, and maintaining compliance with data privacy and security regulations~~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 integration with the marketing portal ~~integration~~
- 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 and manage 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 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

- ~~[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
- [describe use cases for subscription centers](#)
- [create and manage a subscription center](#)
- ~~[marketing page Describe when to use marketing lists and subscription lists](#)~~
- [describe use cases for suppression lists](#)
- ~~[understand how and where to publish subscription centers](#)~~



## Create and manage marketing forms and pages (10—15%)

### Create ~~and manage~~ marketing forms

- determine which marketing form type to use
- ~~identify~~ ~~Determine~~ form requirements and limitations
- create a marketing form ~~by~~ using a template
- [manage form templates](#)
- ~~create~~ [and manage landing marketing forms and pages](#)
- [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 ~~content blocks~~ [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](#)
- [add dynamic content by using Assist Edit](#)

## Manage leads, contacts, and accounts (5—10%)

### ~~Create and m~~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 m~~ [manage activities and activity templates](#)

## Create and manage marketing email [messages](#) (5—10%)

### Create email messages

- [create and manage email templates](#)
- [edit templates by using an HTML editor](#)
- create an email message by using a template
- define mandatory fields for email messages
- [add dynamic content to email messages](#)
- [validate email content for compliance by using the Accessibility Checker](#)
- [check spam scores for messages by using Spam checker](#)

### Manage email messages

- define message requirements
- ~~preview messages by using [the Basic, and iInbox, Litmus options](#)~~[features](#)
- ~~check Spam Scores~~
- ~~design and run~~[Configure A/B testing and review test results on email messages](#)
- validate and publish [email](#) messages

## Manage customer journeys (10—15%)

### Create [automated campaigns by using](#) 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
- ~~implement actions~~ [and](#)
- ~~implement~~ targets
- [implement Power Automate flows](#) ~~control~~ 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](#)

### [Configure and manage real-time 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 the SMS channel](#)
- [configure push notifications](#)

## Manage events and webinars (10—15%)

### Create and configure events and webinars

- create an event ~~team~~
- [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 ~~venues and~~ sessions including internal and external tracks
- set up speakers
- ~~configure webinar options~~
- configure event websites
- create and manage event forms
- ~~create stream events on Microsoft Teams~~
- ~~set up~~ [Configure](#) 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 project](#)
- [select survey questions](#)
- ~~create a theme~~ [Apply branding to surveys](#) and upload images
- ~~add~~ [pages sections](#) to a survey and personalize data
- [apply branching rules to surveys](#)
- [personalize surveys by using variables](#)
- ~~identify survey question types~~
- ~~add survey questions~~
- determine respondent types

- [determine submission options](#)
- [define satisfaction metrics](#)

### **Preview, test, and publish**~~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](#)
- ~~clone, import, and translate surveys~~

### **Manage survey responses**

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