

Microsoft Dynamics 365 Sales



Duration	Delivery Method	Level
1 day	Online / Instructor Led	Intermediate

Microsoft Dynamics 365 for Sales is an end-to-end application to manage the handling of customers and potential customers; tracking data against sales goals, automating your best practices, learning from your data and more. Join our team of globally recognised experts as they take you step by step from lead to opportunity to closed deal. Using the application's available automation and customisation options you will learn how to enable sales staff to be their most productive selves.

Audience Profile

A Dynamics 365 Customer Engagement Functional Consultant is responsible for performing discovery, capturing requirements, engaging subject matter experts and stakeholders, translating requirements, and configuring the solution and applications. The Functional Consultant implements a solution using out of the box capabilities, codeless extensibility, application and service integrations.

Prerequisite

Familiarity of business applications and the desire to customise and implement them for your business.

Course Objectives

After completing this course, students will be able to:

- Install and configure the application
- Identify common sales scenarios
- Complete a sales cycle
- Configure product catalogue
- Manage customer records
- Utilise analytics tools with customer data

Course Content

Module 1: Dynamics 365 Sales

Dynamics 365 Sales helps salespeople build strong relationships with their customers, act based on insights, and close sales faster. It also helps to track accounts and contacts, nurture sales from lead to order, and create sales collateral. This module introduces the Dynamics 365 Sales application and explains how to set up the application.

Learning objectives

In this module, you will:

- Learn about the key features of Dynamics 365 Sales and how it can help your organisation.
- Configure key settings that organisations should customise when setting up the application.
- Set up the included security roles for sales users.

Module 2: Manage leads with Dynamic 365 Sales

The lead management capabilities in Microsoft Dynamics 365 let you connect with your customers in a whole new way. This module provides an overview of what leads are and describes the different options for creating leads, managing them, and working with them throughout their lifecycle. It also provides information about qualifying and disqualifying leads. The more leads you have, the greater your chances of getting opportunities and successfully closing deals.

Learning objectives

In this module, you will:

- Examine the lead qualification process in Dynamics 365 from beginning to end
- Identify the different options that are available for creating and defining leads
- Use business process flows to manage the lead lifecycle
- Qualify and disqualify leads

Module 3: Manage opportunities with Dynamics 365 Sales

The opportunity management capabilities in Microsoft Dynamics 365 make it easy to manage opportunities and convert more leads. In this module, you'll learn how and when opportunities are used and managed in Dynamics 365. You'll also learn about the options for creating opportunities, their relationships with other records, and how to manage them throughout their lifecycle. By providing a complete view of the customer, Dynamics 365 helps you win more deals.

Learning objectives

In this module, you will:

- Identify scenarios where opportunities can be used
- Create and define opportunities
- Work with related opportunity records
- Manage an opportunity throughout its lifecycle

Module 4: Leverage Embedded intelligence in Dynamics 365 sales

It takes time and effort to build a strong, lasting relationship with customers. Account executives must communicate with customers on a regular basis, and they must maintain a complete understanding of who those customers are and what they need. This module focuses on the Embedded Intelligence suite of features in Microsoft Dynamics 365 and how it can help build those relationships.

Learning objectives

In this module, you will:

- Deploy and set up advanced relationship cards
- Use the Auto Capture feature to identify potentially relevant communications
- Set up and consume email tracking

Module 5: Manage and organise your product catalogue with Dynamics 365 Sales

Microsoft Dynamics 365 helps organise and manage even the most complex product catalogue to support your customers in customer engagement scenarios (for example, sales and column service). In this module, you'll learn how to define products, families, and bundles, take advantage of product properties, and define price lists. You'll also learn about pricing options for increased consistency and efficiency.

Learning objectives

In this module, you will:

- Set up unit groups to help control how products are sold
- Create product family hierarchies that include product bundles and individual products
- Set up product pricing data by creating price lists and price list items
- Use discount lists to provide volume discount pricing

Module 6 : Process sales orders with Dynamics 365 Sales

You might sell different items using different processes. However, you must set up at least one sales process in Microsoft Dynamics 365 Sales. But you can set up additional processes to match how your business works. Use sales order processing to automate your organisation. Create and manage orders and support different sales processes such as creating and managing quotes, and working with orders, and invoices.

Learning objectives

In this module, you will:

- Define quote records for opportunity records
- Work a quote through its entire lifecycle

- Add and revise quote product line items
- Deliver quotes to customers

Module 7 : Manage relationships with relationship selling in Dynamics 365 sales

Selling today is about building long-standing relationships with customers. Customers should see you as a trusted advisor to whom they can turn when they need guidance. Building relationships is about knowing who your customers are, what they need, and when to engage with them. Microsoft Social Engagement and LinkedIn Sales Navigator are examples of applications that you can integrate with Dynamics 365 to build these relationships. Additionally, knowing which sales play to execute based on specific situations and understanding the overall health of a customer's relationship with your organisation can help to increase your volume and quantity of sales.

Learning objectives

In this module, you will:

- Discover best practices
- Work with sales playbooks
- Manage relationship health with Sales Insights
- Recognise features of Sales Navigator

Module 8 : Analyse Dynamics 365 sales data

Microsoft Dynamics 365 has multiple analytical options to help organisations drive business decisions that are based on past sales numbers and trends. For example, organisations can define custom views that show specific types of data, use charts to drill into more details about different sales-related records, or even analyse data by using external tools like Microsoft Excel and Microsoft Power BI.

Learning objectives

In this module, you will:

- Review analytical options
- Describe searching tools
- Utilise Power BI to view data
- Analyse data

Module 9 : Define and track individual goals in Dynamics 365 Sales and customer service

Define and track your customer service-related goals including identifying metrics.

Learning objectives

In this module, you will:

- Create and manage individual goals
- Use Parent and Child Goals
- Monitor goal progress

Module 10: Use goal metrics in Dynamics 365 Sales and Customer service

Identify customer service metrics, creating goal metrics, and work with roll-up columns and queries.

Learning objectives

In this module, you will:

- Determine with metrics are needed to build efficient customer service goals
- Modify Fiscal Year settings to align goal progress
- Define Goal Metrics for an Organisation
- Create custom Roll-up columns and Queries