**Dynamics 365 for customer engagement for sales**

Note: This Course is in Development and the Outline will be Revised

This one day workshop provides Sales People, Managers and Business Analysts the skills to manage a salesforce and increase sales using the Sales module and Sales App in Microsoft Dynamics 365 (CRM 2016).

In this workshop, we'll work with Dynamics 365 to establish a Sales Process, Lead Qualification, Account Creation, Contact Management, Opportunity, to Product, Quote, Order and Invoice. In the class will discuss the Dynamics 365 Sales Force Automation tools: Relationship Assistant, Relationship Insights, and Email Engagement, Sales App and Sales Hub. In addition, we will look at LinkedIn Sales Navigator and InsideView for lead Generation.

**Corresponding exam:**MB2-717: Microsoft Dynamics 365 for Sales

**Who should Attend:**

The Primary audience for this workshop is Sales People, Managers and Business Analysts and anyone involved in Lead Generation.

**After completing this workshop, students will be able to understand and/or be able to:**

* Setup Dynamics 365 for Sales for your organization
* Choose the feature and functions that will benefit your organization
* Work with The Sales and Sales Hub apps
* Keep track of customers
* Manage the sales process
* Create a marketing campaign
* Create and manage goals
* Import and export data
* Use Mobile Devices for Sales
* Get better sales performance, intelligence and results!

**Course Outline**

**Module 1: Dynamics 365 CRM for Sales Management**

**Lessons**

* An overview of Dynamics 365 Microsoft’s Customer Relationship Management (CRM) software.
* Upgrading from Salesforce or a prior version of Dynamics CRM
* Dynamics CRM and the alignment of licenses to Dynamics 365
* The Sales Apps that are available for Dynamics 365: Browser, Tablet, Phones, Sales App, Outlook Client
* Navigation and using the feature of Dynamics 365for sales
* Easy task to get started: Importing leads, contacts, tracking a phone call or email

**Module 2: Planning how your organization will use Dynamics 365**

**Lessons**

* Adjust the features and function to match your organization’s specific needs.
* Learn the choices available to you
* Choose features to enable Dynamics 365 for your specific company’s needs.
* Work with and re-design the sales process and related entities:
  + Leads
  + Accounts
  + Contacts
  + Opportunities
  + Products (Product Line Items)
  + Quotes
  + Orders
  + Invoices
* Importing your contacts or leads to start

**Module 3: Selling with Dynamics 365 Sales Apps and Sales Hub**

**Lessons**

* Working with the Sales modules of D365 (CRM)
* Example of how companies are using D365 (CRM)
* The default sales (three step) process
* Example of four and five step lead qualification processes
* Dynamics 365 for Sales standard sales process
* Taking sales from leads to orders
* How to create and edit a lead
* Lead Qualification and converting leads
* Why retain closed leads
* How to and why Reopen a lead
* Creating an opportunity
* Close an opportunity and next step
* Create or edit a quote
* Create or edit an order
* Create or edit an invoice

**Module 4: Setting up Sales Management for your organization**

**Lessons**

* Matching your sales style to the Dynamics 365 platform
* Features and functions to support a sales organization
* Features you can use to track sales
* Focusing your organization on sales activities

**Module 5: Additional Sales Components**

**Lessons**

* Sales Connections and Associations
* Sales Literature
* Tracking Competitors

**Module 6: Managing Sales Opportunities**

**Lessons**

* Qualified Leads
* Creating Customer Quotes
* Closing Opportunities

**Module 7: Working with the Product Catalog**

**Lessons**

* Products
* Price List
* Unit of Sales
* Discount Price List
* Linking to a Products in an accounting system

**Module 8: Sales Administration**

**Lessons**

* Mapping Sales Processes to Business Flows
* Tracking your sales efforts with activities

**Module 9 Dynamics 365 for Marketing**

**Lessons**

* Use Activities to track your efforts and customer
* **Planned Marketing Campaigns with budgets and activities**
* Create a marketing list
* Add assets to a campaign
* Create or edit a campaign
* Add an activity to a campaign
* Track a marketing campaign response
* Use Sales Hub on mobile
* **Marketing Campaigns without budgets and tracking**
* Using Quick Campaigns for direct marketing
* Creating a quick campaign

**Module 10: Monitoring Sales progress with Sales Analysis**

* Creating and Using Charts
* Creating Dashboards
* Standard Templates by sales role

**Module 11: Working with Sales Metrics and Goals**

* Establishing Sales Goals
* Sales Metrics
* Tracking Sales Progress

**Module 12: Reporting and Power BI**

* Reports and printing
* Run a report
* Add or edit Power BI visualizations on your dashboard

**Module 13: Artificial Intelligence (AI) for Salesforce Automation**

* Relationship Assistant
* Sales App,
* Email Engagement
* Relationship Insights

**Module 14: Workshop Review**

* Sales Apps that are available for Dynamics 365
* Planning how your organization will use Dynamics 365
* Selling with Dynamics 365 Sales Apps and Sales Hub
* Setting up Sales Management for your organization
* Additional Sales Components
* Managing Sales Opportunities
* Working with the Product Catalog
* Sales Administration
* Dynamics 365 for Marketing
* Monitoring progress with Sales Analysis
* Working with Sales Metrics and Goals
* Reporting and Power BI
* Artificial Intelligence (AI) for Salesforce Automation
* Preparing for the Microsoft Dynamics 365 for Sales Exam MB2-717

**Prerequisites**

This course requires that you meet the following prerequisites:

* Basic computer entry skills, such as MS Word