



# Course 816705 • Microsoft Dynamics 365 Sales & Sales Apps Workshop (CRM)

## Length

- 1 day

## Prerequisites

- Basic computer entry skills, such as Microsoft Word

## Audience

- Salespeople, Managers and Business Analysts
- Anyone involved in Lead Generation

## What You'll Learn

- 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!

This one-day workshop provides salespeople, 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).

We will work with Dynamics 365 to establish a Sales Process, Lead Qualification, Account Creation, Contact Management, Opportunity, to Product, Quote, Order and Invoice. The class will discuss the Dynamics 365 Sales Force Automation tools: Relationship Assistant, Relationship Insights, Email Engagement, Sales App and Sales Hub.

We will also look at LinkedIn Sales Navigator and InsideView for lead Generation.

## Workshop Outline

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

- 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 365 for 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

- 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**

- 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**

- 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**

- Sales Connections and Associations
- Sales Literature
- Tracking Competitors

### **Module 6: Managing Sales Opportunities**

- Qualified Leads
- Creating Customer Quotes
- Closing Opportunities

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

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

## **Module 8: Sales Administration**

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

## **Module 9: Dynamics 365 for Marketing**

- 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