MB-210T01: Microsoft Dynamics 365 Sales

Course Code: MB-210T01
Duration: 2 days
Instructor-led Training (ILT) | Virtual Instructor-led Training (VILT)

OVERVIEW

Microsoft Dynamics 365 Sales is an end-to-end application to manage the handling of customers and potential customers. Using Dynamics 365 Sales, organizations can track data against sales goals, automate best practices, learn from data, and more.

Join our team of globally recognized experts as they take you step by step from lead to opportunity to closed deal. Using the application's available automation and customization options you will learn how to enable sales staff to be their most productive selves.

SKILLS COVERED

After completing this module, you will be able to:

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

WHO SHOULD ATTEND?

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.

PREREQUISITES

Familiarity of business applications and the desire to customize and implement them for your business.
The prerequisites above can be achieved by completing the following courses:

- PL-900T00: Microsoft Power Platform Fundamentals
- MB-910T00: Microsoft Dynamics 365 Fundamentals Customer Engagement Apps (CRM)
- MB-920T00: Microsoft Dynamics 365 Fundamentals (ERP)

MODULES

Module 1: Set up and configure 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 organization.
- Configure key settings that organizations should customize when

setting up the application.
- Set up the included security roles for sales users.

Prerequisites

Basic understanding of navigation in the Microsoft Dynamics 365 application and a working knowledge of the core records that are used in sales scenarios

Module 2: Manage leads with Dynamics 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

Prerequisites

The target audience should have a basic understanding of how to move around in the Dynamics 365 application, and also a working knowledge of the core records that are available.

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

Prerequisites

The target audience should have a basic understanding of how to move around in the Dynamics 365 application, and also a working knowledge of the core records that are available. Familiarity working with leads is also helpful but isn't required.

Module 4: Work with Dynamics 365 Sales insights

- Configure Sales Insight – Dynamics 365 Sales Insights uses AI to help you build and sustain good customer relationships. In this module, you learn about configuring Sales Insights.
- Work with Dynamics 365 Sales Insights – Building a strong, long-term relationship with a customer takes time

and effort. Account executives need to communicate with customers regularly and maintain a complete understanding of who that customer is and what they need. This module focuses on Dynamics 365 Embedded Intelligence. Businesses can use it to help build those customer relationships by using its features such as the relationship assistant, auto capture and email tracking, and sales insights.

- Assistant studio tutorials for Dynamics 365 Sales Insights – Showing the right insights at the right time can make a significant difference in productivity. Providing relevant insights to your sellers is important and is also a difficult task. Sales Insights provide many insights out-of-box through Relationship Assistant, but over time we identified that every organization and every sales team are different. To help ensure the assistant is still relevant, we allowed you to add customized insights and display for your teams. Using the Microsoft Power Automate, the Assistant studio allows you to create insights through low code no code.In this module, you will learn how to create various custom insights using Power Automate. The following tutorials help you get started with a basic custom insight, a hello world equivalent, and we gradually increase the complexity as we go along.
- Create sales sequences with Sales Insights – Salespeople engage with multiple customers every single day. They're responsible to qualify leads, nurture opportunities and to do so they need to be laser focused and act effectively in a timely manner. Sales organizations continuously invest in ongoing training and coaching so that salespeople are familiar with best practices and operate according to the business processes recommended in their organization. Sequences help sellers align to these processes by following a predefined set of consecutive actions reflecting their sales organization best practices. In this module, you learn how to create and manage sequences for your organization. The following tutorials help you get started with creating a basic sequence, connecting it to a record, modifying it, and so forth.

Module 5: Manage and organize your product catalog with Dynamics 365 Sales

Microsoft Dynamics 365 helps organize and manage even the most complex product catalog 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

Prerequisites

A basic understanding of how to move around in the Dynamics 365 application. Familiarity with core sales fundamentals like leads, opportunities, orders, and invoices can also be helpful.

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 organization. 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

Prerequisites

Basic understanding of how to navigate the Dynamics 365 application. Familiarity with creating and managing lead and opportunities, as well as the Dynamics 365 product catalog is also helpful.

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 organization 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
- Recognize features of Sales Navigator

Prerequisites

Target Audience should have a basic understanding of how to navigate the Dynamics 365 application. Familiarity with creating and managing cases or creating and managing leads and opportunities is also helpful.

Module 8: Analyze Dynamics 365 sales data

Microsoft Dynamics 365 has multiple analytical options to help organizations drive business decisions that are based on past sales numbers and trends. For example, organizations can define custom views that show specific types of data, use charts to drill into more details about different sales-related records, or even analyze 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
- Utilize Power BI to view data
- Analyze data

Prerequisites

Basic understanding of navigation in the Dynamics 365 application. Familiarity with creating and managing cases, or creating and managing leads and opportunities, is also helpful.

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

Prerequisites

A basic understanding of how to navigate in the Dynamics 365 application. Familiarity with creating and managing cases, Entitlements, and Service Level Agreements is also helpful.

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 Organization
- Create custom Roll-up columns and Queries

Prerequisites

A basic understanding of how to navigate the Dynamics 365 application. Familiarity with creating and managing cases, Entitlements, and Service Level Agreements is also helpful.

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