Introduction to Sales in Dynamics 365

Course AB-6003 One Day Instructor-Led, Hands-on

Course Overview

This course will teach you how to enhance and automate business processes using customer engagement apps for Dynamics 365, while incorporating native interconnectivity with Microsoft 365. You will also learn to unify profiles, tailor personalized customer journeys with AI-assisted Dynamics 365 Customer Insights, and improve selling efficiency through AI-driven Sales features within Dynamics 365 Sales.

Who Should Attend?

This course is designed for professionals who aim to enhance and automate business processes using Dynamics 365 customer engagement apps, while leveraging native interconnectivity with Microsoft 365. It is ideal for those looking to unify profiles, create personalized customer journeys with AI-assisted Dynamics 365 Customer Insights, and improve selling efficiency through AI-driven Sales features.

Course Outline

Module 1: Describe the foundations of Dynamics 365 customer engagement apps

- Describe customer engagement apps in Dynamics 365
- Describe the cross-solution capabilities of customer engagement apps
- Navigate to and within customer engagement apps
- Describe the Timeline feature in customer engagement apps
- Explore prompting in Dynamics 365 apps with Copilot Chat
- Describe security in customer engagement apps
- Describe the AI form filling assistant
- Manage daily actions with the communications assistant
- Module assessment

Module 2: Explore lead generation in Dynamics 365

- Describe use cases for Customer Insights - Journeys
- Describe lead generation and nurturing
- Describe segments
- Describe marketing email
- Describe forms
- Describe journeys
- Simulation - Create a customer journey
- Describe event management

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Module 3: Explore lead qualification in Dynamics 365

- Describe use cases for Dynamics 365 Sales
- Describe the lead to opportunity process
- Describe using AI in sales prospecting
- Describe the work list and sequences
- Describe the use of the Sales Qualification Agent in prospecting
- Describe the Sales Research Agent in prospecting
- Describe the use of Sales in Microsoft 365 Copilot in prospecting
- Explore the Sales mobile app
- Describe LinkedIn Sales Navigator
- Describe the full AI-assisted lead qualification process

Module 4: Identify customer needs and explore relationships in Dynamics 365

- Describe the Sales Close Agent
- Describe the use of the Sales Close Agent - Research
- Describe the use of the Sales Close Agent - Engage
- Describe the use of the Sales Research Agent in customer engagement
- Use AI agents to analyze pipeline, qualify leads, and engage opportunities
- Describe the use of Sales in Microsoft 365 Copilot in customer engagement
- Describe the Focused View in the sales process
- Describe collaboration with Microsoft Teams in the sales process
- Module assessment

Module 5: Explore how to negotiate deal terms and address objections in Dynamics 365 Sales

- Describe Copilot in sales and negotiation
- Describe the product catalog in Dynamics 365 Sales
- Describe the Sales Close Agent in negotiation
- Describe the use of the Sales Research Agent in negotiation
- Describe the use of Microsoft 365 Copilot in negotiation
- Describe the AI-assisted deal negotiation process
- Module assessment

Module 6: Describe how to close customer deals in Dynamics 365

- Describe the use of the Sales Close Research Agent in closing
- Describe the use of the Sales Close Agent in Engage mode
- Describe the use of the Sales Research Agent in closing
- Describe the use of Sales in Microsoft 365 Copilot in closing
- Review the sales close process in Dynamics 365 with AI assistance

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- Module assessment

Module 7: Describe sales account management in Dynamics 365

- Describe the core capabilities of Dynamics 365 Customer Insights – Data
- Describe unified customer profiles
- Describe measures, segments, and predictions
- Describe churn risk prediction and Customer Lifetime Value to manage accounts
- Describe how to Dynamics 365 Customer Insights - Data in other apps
- Describe Copilot in Sales as part of account management
- Describe the Sales Research Agent in account management
- Module assessment

Module 8: Explore forecasting, pipeline management, and analytics in Dynamics 365 Sales

- Describe forecasting in Dynamics 365 Sales
- Describe pipeline management
- Describe Relationship Intelligence and analytics
- Describe how to monitor the agents
- Describe Copilot in Sales in forecasting and reporting
- Describe the Sales Qualification Agent in forecasting and reporting
- Describe the Sales Close Agent in forecasting and reporting
- Module assessment

Module 9: Describe shared capabilities in Dynamics 365 customer engagement apps

- Describe the options for tailoring customer engagement apps to meet business needs
- Enhance customer engagement apps with Microsoft Power Platform Integration
- Describe reporting capabilities including charts, dashboards, and views
- Describe Microsoft 365 integrations
- Describe the capabilities of Copilot in customer engagement apps
- Describe autonomous agents in Dynamics 365
- Module assessment