

COURSE OVERVIEW

Course Name:
(MB-210) Microsoft Dynamics 365 for Sales

COURSE DURATION: 2 Days

Gauteng:

3rd Floor, 34 Whitely Road
Melrose Arch
Johannesburg
2196

Gauteng:

192 on Bram
192 Bram Fischer Drive
Ferndale, Randburg
Johannesburg
2160

Cape Town:

3rd Floor, Thomas Pattullo Building
19 Jan Smuts St
Cape Town
8000

Durban:

9 Mountview Close
Broadlands
Mount Edgecombe
Durban
4302

 **087 941 5764**

 **sales@impactful.co.za**

 **impactful.co.za**

INTRODUCTION

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.

DELIVERY METHOD

Our courses have flexible delivery options:

- In-person classroom training at the Impactful training facilities
 - Johannesburg, Durban, Cape Town
- Virtual instructor-led training
- Nationally: on-site at the client

INTENDED AUDIENCE

A Dynamics 365 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.

COURSE CONTENT

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.

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.

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.

Leverage Embedded Intelligence in Dynamics 365 Sales

It takes time and effort to building 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.

Manage and organize your product catalogue with Dynamics 365 Sales

Microsoft Dynamics 365 helps organize 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.

Process sales orders with Dynamics 365 Sales

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 other 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.

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.

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

Define and track individual goals in Dynamics 365 Sales and Customer Service

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

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.