WorkshopPLUS - Dynamics 365 Customer Engagement - Introduction to Sales

WorkshopPLUS

Duration: 1 Day [Remote | Onsite]

Difficulty Level: 200 - Intermediate

Description

Learn how to use Dynamics 365 for Sales using the Sales Hub app. In this course you will gain hands on experience walking through the sale process with leads, opportunities, quotes, orders and invoices. You will also come to understand the options available for securing data, setting up sales goals, tracking interactions with customers and extracting sales data.

Objectives

- Empower your sales team to understand business relationships, evaluate activities based on past successes, and select the best strategies for building strong customer relationships, making informed decisions, and closing deals faster with the Sales Hub App.
- Learn to set up and configure the Sales Hub App by following best practices and ensuring secure data management.

Outcomes

- Develop skills and knowledge to help your sales team understand business relationships, assess activities based on past successes, and choose the best strategies for building strong customer relationships.
- Empower your sales team to make informed decisions and close deals faster using the Sales Hub App.

Methodology

Learn by example

Participate in group discussions and learn from presentations and demonstrations.

Hands-on

- Use a ready environment for a hands-on experience.

Scope

The focus is on learning to use the Dynamics 365 Sales Hub app, with all applications and environments contained within a single tenant.

Agenda

- Introduction to Dynamics 365 Sales Hub app and its features.
- How to manage accounts, contacts, leads, opportunities, quotes, orders, and invoices.
- How to set up and configure the Sales Hub app for data security, sales goals, and customer interactions.
- How to use Sales Insights to enhance productivity, predict and prioritize tasks, and optimize sales strategies.
- Hands-on labs to practice using the Sales Hub app and Sales Insights.

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Delivery Outline

Requirements		
Participants • Dynamics 365 Sales or Dynamics 365 Customer Service App users. • System Administrators. **Skill Requirements** • Understanding of the Customer Relationship Management concepts. **Time Commitment** • One full-day engagement with relevant roles.		**Delivery Requirements** • Computer with Windows 10 or later, audio equipment, internet access. Modern browser and at least 1 Mbps bandwidth per participant. • Microsoft/Windows Live ID to connect to the virtual environment. • Microsoft Teams for remote deliveries.

Education	
Day 1	
Introduction to Sales Insights	• Introduction to Dynamics 365 Sales Hub app and its features. • How to manage accounts, contacts, leads, opportunities, quotes, orders, and invoices. • How to set up and configure the Sales Hub app for data security, sales goals, and customer interactions. • How to use Sales Insights to enhance productivity, predict and prioritize tasks, and optimize sales strategies. • Hands-on labs to practice using the Sales Hub app and Sales Insights.

If you are interested in this engagement for your organization, contact your Microsoft Account Representative.

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