

Microsoft Dynamics 365 Sales – Intensive Training («MB210»)

Learn how to use Dynamics 365 for your sales-related activities and build strong relationships with your customers, take actions based on insights, and close sales faster.

Duration: 2 days

Price: 1'800.–

Course documents: Official Microsoft Courseware and Added Value Content

Vendor code: MB-210

Content

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.

Outline:

Module 1: Setting up and configuring 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.

Module 2: Managing 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.

Module 3: Managing 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.

Module 4: Working with Dynamics 365 Sales insights

- Configure and work with Dynamics 365 Sales Insights data to gain insights to your customers. This learning path covers configuration and working with Sales Insights.

Module 5: Managing and organizing 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.

Module 6: Processing 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 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.

Module 7: Managing 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.

Module 8: Analyzing 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.

Module 9: Defining and tracking individual goals in Dynamics 365 Sales and Customer Service

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

Module 10: Using goal metrics in Dynamics 365 Sales and Customer Service

- Identify customer service metrics, creating goal metrics, and work with roll-up columns and queries.

Key Learnings

- Configuring Dynamics 365 Sales
- Managing core sales tables
- Configuring additional tools and services

Target 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.

Requirements

- Strong business knowledge of sales processes for business-to-customer and business-to-business scenarios
- Understanding of the sales process of the customer as well as the core functionality of Dynamics 365 Sales to identify where the two align and differ
- Proficiency in configuring Microsoft Power Platform, primarily model-driven apps
- Knowledge of Microsoft 365 services and their interactions with Microsoft Dataverse
- [Microsoft Dynamics 365 Fundamentals \(CRM\) – Intensive Training \(«MB910»\)](#)

Certification

This intensive training prepares you for:

- **Exam:** «[MB-210: Microsoft Dynamics 365 Sales](#)» for the
- **Certification:** «[Microsoft Certified: Dynamics 365 Sales Functional Consultant Associate](#)»

Any questions?

We are happy to advise you on +41 44 447 21 21 or info@digicomp.ch. You can find detailed information about dates on www.digicomp.ch/courses-microsoft-technology/microsoft-business-applications-dynamics-365/microsoft-dynamics-365-customer-engagement/course-microsoft-dynamics-365-sales-intensive-training-mb-210