

## MS-MB280T02: EMPOWER SELLERS WITH DYNAMICS 365 SALES



DURATION	LEVEL	TECHNOLOGY	DELIVERY METHOD	TRAINING CREDITS
2 Days	Intermediate	Dynamics 365	Instructor-led	NA

### INTRODUCTION

Dynamics 365 Sales helps accelerate sales teams' efforts with relationship-building tools and AI-driven insights. In this course, students will learn how to configure and leverage Dynamics 365 Sales to set sales teams up for success. First, students will set up and configure lead and opportunity management strategies. Then students will organize their product catalog and process sales orders. Finally, students will leverage relationship selling features, the Sales accelerator, and Sales Insights. In this course students will also learn how to set up and deploy Microsoft Copilot for Sales, a productivity tool to help sellers inside and outside Dynamics 365 Sales. This course is part of a four-course series (MB-280T01-T04) aligning to the MB-280 certification exam.

### AUDIENCE PROFILE

This course is designed for IT or sales professionals who want to learn how to leverage Dynamics 365 Sales and Microsoft Copilot for Sales for their organizations. Students should have knowledge in basic sales principles. Students should be familiar with the Dynamics 365 customer experience suite, including Dynamics 365 Sales and Dynamics 365 Customer Insights. They should also have basic model-driven application configuration experience.

### PREREQUISITES

Before attending this course, delegates should have:

- Basic Understanding of Microsoft Dynamics 365 Applications: Familiarity with Dynamics 365 applications is essential.
- Knowledge of Sales Concepts and Processes: A fundamental understanding of sales principles and processes is required.
- Familiarity with Microsoft 365 Tools: Basic knowledge of Microsoft 365 tools such as Teams and Outlook is beneficial.
- CRM Principles and Customer Engagement Strategies: Understanding CRM principles and customer engagement strategies will be helpful.
- Experience with Dynamics 365 Customer Experience Suite: Specifically, familiarity with Dynamics 365 Sales and Dynamics 365 Customer Insights is necessary.
- Basic Model-Driven Application Configuration Experience: Some experience with configuring model-driven applications is recommended.

### COURSE OBJECTIVES

This course aims to help students configure and leverage Dynamics 365 Sales to enhance sales team performance. Here are the key course objectives:

- Lead and Opportunity Management: Set up and configure strategies for managing leads and opportunities.
- Product Catalog Organization: Organize and manage the product catalog effectively.
- Sales Order Processing: Process sales orders efficiently using Dynamics 365 Sales.
- Relationship Selling: Leverage relationship selling features to build stronger customer relationships.
- Sales Accelerator and Insights: Utilize the Sales accelerator and Sales Insights to boost sales performance.
- Microsoft Copilot for Sales: Set up and deploy Microsoft Copilot for Sales to enhance productivity.

### COURSE CONTENT

#### Module 1: Create powerful customer experiences for organizations with Dynamics 365 apps

Explore how you can use Dynamics 365 customer engagement apps to deliver powerful customer experiences for your customers.

##### Lessons

- Introduction
- Dynamics 365 customer experience apps in an organization's journey

- Work with the other Dynamics 365 apps as part of a customer engagement solution
  - Work with Copilot in the Dynamics 365 customer engagement apps
  - Check your knowledge
  - Summary
- By the end of this module, you will be able to:

- How customer engagement apps can be used in an organization
- How Dynamics 365 and Power Platform can be used with customer engagement apps

#### Module 2: Get started with Dynamics 365 Sales

Learn about some elements of Dynamics 365 Sales to help you get started working with the application.

## Lessons

- Introduction
- Overview of Sales products
- Navigate in Dynamics 365 Sales
- Manage customers
- Copilot in Dynamics 365 Sales
- In-app marketing
- Check your knowledge
- Summary

In this module, you'll learn about:

- The Dynamics 365 Sales application and how organizations can use it.
- Core elements of the application and how to navigate within it.
- Management of customers in the application, and how to work with in-app marketing features.

### Module 3: 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.

## Lessons

- Introduction
- Set up and configure the application
- Use customization options
- Document management
- Set up security roles
- Configure Copilot in Sales
- Check your knowledge
- Summary

In this module, you'll learn about

- 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.

### Module 4: 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.

## Lessons

- Dynamics 365 leads overview
- Create Dynamics 365 leads
- Lead management lifecycle
- Lead qualification
- Use Copilot with leads
- Lab - Work with Dynamics 365 leads
- Lead data management tools
- Check your knowledge
- Summary

In this module, you'll learn about:

- 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

### Module 5: 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.

## Lessons

- Dynamics 365 opportunity overview
- Create Dynamics 365 opportunities
- Account and team selling
- Opportunity management lifecycle
- Use Copilot with opportunities
- Lab - Manage opportunities in Dynamics 365
- Check your knowledge
- Summary

By the end of this module, you will be able to:

- Identify scenarios where opportunities can be used.
- Create and define opportunities.
- Work with related opportunity records
- Manage an opportunity throughout its lifecycle.

### Module 6: 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 learn

how to define products, families, and bundles, take advantage of product properties, and define price lists. You also learn about pricing options for increased consistency and efficiency.

## Lessons

- Dynamics 365 product catalog overview
- Currencies and currency management
- Define products
- Product families
- Price lists
- Product catalog settings
- Exercise - Set up the product catalog
- Check your knowledge
- Summary

By the end of this module, you will be able to:

- 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

### Module 7: 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 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.

## Lessons

- Sales order processing overview
- Quotes and quote management
- Orders and invoices
- Exercise - Sales order processing lifecycle
- Check your knowledge
- Summary

By the end of this module, you will be able to:

- Define quote records for opportunity records
- Work a quote through its entire lifecycle
- Add and revise quote product line items
- Deliver quotes to customers

### Module 8: Configure forecasts in Dynamics 365 Sales

Do you need to anticipate future demand, identify problems and opportunities, and improve overall

growth performance? Configure forecasts in Dynamics 365 Sales to meet customer needs, minimize waste, reduce costs, and improve performance.

#### Lessons

- Introduction
- Build forecasts
- Manage forecasts
- Configure advanced features
- Premium features
- Check your knowledge
- Summary

By the end of this module, you will be able to:

- Configuration of forecasts based on specific needs.
- Available forecast management and advanced configuration options.
- Available premium forecasting features.

### Module 9: 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.

#### Lessons

- Overview
- Sales accelerator
- Manage relationship health with Sales Insights
- Sales Navigator
- Check your knowledge
- Summary

By the end of this module, you will be able to:

- Discover best practices
- Manage relationship health with Sales Insights
- Recognize features of Sales Navigator

### Module 10: 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.

#### Lessons

- Analytical options overview
- Search tools
- Out-of-box tools
- Power BI
- Use Power BI templates
- Lab - Analyze data
- Check your knowledge
- Summary

By the end of this module, you will be able to:

- Review analytical options
- Describe searching tools
- Utilize Power BI to view data
- Analyze data

### Module 11: Set up Sales accelerator in Dynamics 365 Sales

The Sales accelerator in Dynamics 365 Sales provides sellers with a tailored experience that helps them minimize the time that they need to spend identifying which customer to reach out to next. The system gathers information from multiple sources so that sellers can focus on how to best approach their customers. With the Sales accelerator, sellers can sell smartly by building a strong and prioritized pipeline, offering context, and showing automated recommendations throughout a sales sequence that helps accelerate the sales process.

#### Lessons

- Introduction
- Set up Sales accelerator
- Manage record types and forms
- Customize the Sales accelerator workspace
- Manage filter options
- Manage sorting options
- Add the Up next widget to forms
- Sales acceleration reporting
- Check your knowledge
- Summary

By the end of this module, you will be able to:

- Learn about the Sales accelerator and what it does.
- Explore how to set up Sales accelerator.
- Examine how to manage access and record types.
- Discover how to customize the workspace.
- Learn how to set up filtering and sorting.
- Learn how to add the Up next widget to forms.

### Module 12: 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.

#### Lessons

- Introduction
- Get started with the work list
- Tutorial 1 - Build a sales sequence
- Tutorial 2 - Connect sequence to a record
- Tutorial 3 - Disconnect sequence from record
- Tutorial 4 - Editing sales sequence
- Check your knowledge
- Summary

By the end of this module, you will be able to:

- Create a basic sequence.
- Connect a sequence to a record.
- Disconnect a sequence from a record.
- Edit a sequence.
- Establish a flow to automatically connect sequences to records.

### Module 13: Work with segments in Dynamics 365 Sales accelerator

In Dynamics 365 Sales accelerator, a segment is a collection of records that are grouped together based on certain conditions, such as location, deal value, language, and product. You can use segments to automatically connect records to sequences and create assignment rules to automatically assign sellers to records.

#### Lessons

- Introduction
- Create and activate a segment
- Connect a segment to a sequence
- View details of a segment
- Manage segments
- Check your knowledge
- Summary

By the end of this module, you will be able to:

- Examine how to create and activate segments.

- Explore how to connect segments to sequences.
- Learn how to view the details of a segment.
- Explore how to manage a segment, including how to edit, change the priority, deactivate, or delete a segment.

### Module 14: Work with assignment rules in Dynamics 365 Sales accelerator

To assist organizations with assigning records, Dynamics 365 Sales includes an assignment rules feature. Organizations can use assignment rules to have new leads and opportunities automatically assigned to sellers or sales teams. This approach helps reduce the amount of time and effort that's required to manually assign records, prevent the loss of unassigned records, and balance assignments among sellers.

#### Lessons

- Introduction
- Assignment overview
- Define users
- Manage seller attributes in assignment rules
- Create and activate assignment rules
- Manage assignment rules
- View and manage unassigned records
- Check your knowledge
- Summary

By the end of this module, you will be able to:

- Discover the different options that are available for assigning lead and opportunity records.
- Explore how to specify which sellers can have records assigned to them.
- Examine what seller attributes are and how to create them.
- Learn about seller availability and how it impacts record assignment.
- Examine how to create and activate assignment rules.
- Explore the options that are available for managing rules.
- Learn how to manage unassigned records.

### Module 15: Engage with customers through text messages in Dynamics 365 Sales

Sending and receiving text messages is an effective way for sellers to reach out to potential customers. Text messages are fast, convenient, and allow for quick responses. Additionally, using text messaging makes it easier for sellers to stay in touch with their customers by quickly responding to questions or concerns and providing updates and information on products and services. With

Dynamics 365 Sales, sellers can engage with customers through the text message feature.

#### Lessons

- Introduction
- Set up the text messaging provider
- Edit phone numbers
- Add a text message option to custom forms
- Manage text message conversations
- Check your knowledge
- Summary

By the end of this module, you will be able to:

- Explore the available text messaging capabilities in Dynamics 365 Sales.
- Learn how to set up a text messaging provider.
- Discover how to edit phone numbers.
- Explore how to add the text message option to forms.
- Learn how to work with text messages.

### Module 16: Define and track individual goals in Dynamics 365 Sales and Customer Service

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

#### Lessons

- Overview of goals
- Defining individual goals
- Parent and child goals
- Exercise - Measuring customer success using goals
- Check your knowledge
- Summary

By the end of this module, you will be able to:

- Create and manage individual goals
- Use Parent and Child goals
- Monitor goal progress

### Module 17: 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.

#### Lessons

- Overview
- Fiscal year settings
- Goal metrics
- Exercise - Defining goal metrics
- Check your knowledge
- Summary

By the end of this module, you will be able to:

- 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

### Module 18: Use Microsoft 365 services with model-driven apps and Microsoft Dataverse

Microsoft 365 services, such as SharePoint and Microsoft Exchange, can help fill areas where model-driven apps don't have the tools necessary to help meet your specific needs.

#### Lessons

- Introduction
- Set up mailboxes
- Server-side sync
- Document management options
- Document management
- Deploy the app for Outlook
- Set up Dynamics 365 App for Outlook
- Integrate with Microsoft Teams
- Check your knowledge
- Summary

By the end of this module, you will be able to:

- Integrate email with Microsoft Dataverse to show emails as activities in Dynamics 365 applications and model-driven apps.
- Examine server-side synchronization and learn why it matters in Power Platform implementations.
- Review and set up document management options that are available through Microsoft SharePoint.
- Learn about the app for Outlook and how to deploy it.
- Tailor the app for Outlook.

### Module 19: Get started with the Dynamics 365 Sales mobile app

The Dynamics 365 Sales mobile app helps sellers build better relationships with their customers and be more productive.

#### Lessons

- Introduction
- Deploy the mobile app
- Use the mobile app
- Manage records
- Customize form views
- Set up push notifications
- Check your knowledge
- Summary

By the end of this module, you will be able to:

- Learn how to deploy and use the Dynamics 365 Sales mobile app.
- Manage records.
- Customize form views.
- Set up push notifications

## ASSOCIATED CERTIFICATIONS & EXAM

This course will prepare delegates to write the Microsoft MB-280: Microsoft Certified: Dynamics 365 Customer Experience Analyst Associate exam.