MS-MB910T00: MICROSOFT DYNAMICS 365 FUNDAMENTALS CUSTOMER ENGAGEMENT APPS (CRM)

DURATION	LEVEL	TECHNOLOGY	DELIVERY METHOD	TRAINING CREDITS
1 Day	Beginner	Dynamics 365	Instructor-led	NA

INTRODUCTION

This course will provide you with a broad introduction to the customer engagement capabilities of Dynamics 365. You will become familiar with the concept of customer engagement, as well as each of the customer engagement apps, including Dynamics 365 Marketing, Dynamics 365 Sales, Dynamics 365 Customer Service, Dynamics 365 Field Service, and the customer relationship management (CRM) capabilities of Dynamics 365 Project Operations. This course will include lecture as well as hands-on labs.

AUDIENCE PROFILE

The Microsoft Dynamics 365 Fundamentals (CRM) course is targeted to those looking to familiarize themselves with and gain a broad exposure to the marketing, sales, customer service, and field service capabilities of Dynamics 365. This audience wants to explore how customer engagement apps (CRM) for Dynamics 365 can be used to:

− Unify profiles and tailor targeted customer journeys by using Dynamics 365 Customer Insights apps.
− Efficiently assist users through the complete sales order lifecycle by using Dynamics 365 Sales.
− Assist agents with case management through the complete customer support lifecycle by using Dynamics 365 Customer Service.
− Schedule and complete work orders by using Dynamics 365 Field Service.
− Evaluate how Copilot can assist with each of these. People in various roles and stages in their careers can benefit from this fundamentals course. The course is designed for IT professionals, business stakeholders, entrepreneurs, students, and people starting or changing careers who want to be exposed to the customer relationship capabilities of Dynamics 365.

PREREQUISITES

Learners should have a fundamental understanding of customer engagement principles and business operations. An understanding of cloud computing is helpful but isn't necessary.

COURSE OBJECTIVES

After completing this course, students will be able to:

− Describe the capabilities and functionality of Dynamics 365 Marketing
− Describe the capabilities and functionality of Dynamics 365 Sales
− Describe the capabilities and functionality of Dynamics 365 Customer Service
− Describe the capabilities and functionality of Dynamics 365 Field Service
− Describe the core capabilities of Dynamics 365 customer engagement apps
− Describe the capabilities and functionality of Dynamics 365 Project Operations (CRM)

COURSE CONTENT

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

This module introduces learners to the customer engagement applications for Dynamics 365, the individual apps and how they relate to Microsoft Power Platform and Microsoft Dataverse.

Lessons
− Introduction
− Describe customer relationship management
− Describe Microsoft Power Platform and Dynamics 365 customer engagement apps
− Describe Microsoft Dataverse and Dynamics 365 customer engagement apps
− Describe use cases for Dynamics 365 customer engagement apps
− Describe the capabilities of Copilot in the Dynamics 365 customer engagement apps
− Navigate to and within Dynamics 365 customer engagement apps
− Module assessment
− Summary and resources

After completing this module, students will be able to:

− Describe use cases for Dynamics 365.
− Describe how the Microsoft Power Platform relates to Dynamics 365 apps.
− Explain what Microsoft Dataverse is and how it is used by Dynamics 365 customer engagement apps.
− Describe the different Dynamics 365 customer engagement apps.
− Describe options for accessing Dynamics 365 customer engagement apps.

– Describe Copilot in Dynamics 365 customer engagement apps.

Module 2: Describe shared activities and integration options in Dynamics 365 customer engagement apps
In this module, learners will be introduced to activities and integration options across the customer engagement apps for Dynamics 365.
Lessons
– Introduction.
– Describe customers and activities.
– Exercise: Manage customers and activities.
– Describe search criteria and filters.
– Describe reporting capabilities including charts, dashboards, and views.
– Describe Excel integrations.
– Describe Microsoft Teams integration.
– Describe Outlook integration.
– Knowledge check.
After completing this module, students will be able to:
– Work with customers and manage activities.
– Explore different reporting options.
– Describe the available integration options.

Module 3: Explore Dynamics 365 Customer Insights – Journeys
This module introduces learners to Dynamics 365 Customer Insights - Journeys. Its marketing automation capabilities provide organizations with a solid foundation to design automated customer journeys that help guide and nurture prospects.
Lessons
– Introduction.
– Describe use cases for Dynamics 365 Customer Insights - Journeys.
– Explore a Dynamics 365 Customer Insights - Journeys business scenario.
– Describe email marketing.
– Describe how to target customers by using marketing lists and segments.
– Describe customer journeys.
– Describe lead generation and qualification.
– Describe use cases for marketing forms.
– Describe event management features and capabilities.
– Knowledge check.
After completing this module, students will be able to:
– Identify use cases for Dynamics 365 Customer Insights - Journeys.

– Explain email marketing.
– Describe how to target customers with segments.
– Explain how to create and use customer journeys in Dynamics 365 Customer Insights - Journeys.
– Describe lead generation and qualification.
– Describe event management features and capabilities.

Module 4: Describe Dynamics 365 Customer Insights - Data
This module introduces learners to how to use Dynamics 365 Customer Insight – Data to generate unified customer profiles and how to use that data in other apps.
Lessons
– Introduction
– Describe the core capabilities of Dynamics 365 Customer Insights-Data
– Explore a Dynamics 365 Customer Insights - Data business scenario
– Describe unified customer profiles
– Describe measures, segments, and predictions
– Describe consuming Dynamics 365 Customer Insights - Data in other apps
– Describe the capabilities of Copilot in Customer Insights - Data
– Module assessment
– Summary and resources
After completing this module, students will be able to:
– Describe the use cases of Customer Insights - Data.
– Explain unified customer profile.
– Describe measures, segments, and predictions.
– Describe consuming Customer Insights – Data in other applications such as Customer Insights - Journeys.

Module 5: Explore Dynamics 365 Sales
This module introduces learners to Dynamics 365 Sales focusing on managing leads, lead qualification, opportunities and sales orders as part of the standard sales lifecycle.
Lessons
– Introduction.
– Describe use cases for Dynamics 365 Sales.
– Review the sales lifecycle.
– Explore a Dynamics 365 Sales business scenario.
– Describe leads and the process for qualifying leads.
– Describe the opportunity management process.
– Describe sales order processing.

– Describe Dynamics 365 Sales business process flows.
– Describe Sales Accelerator.
– Exercise: Work with leads and opportunities.
– Knowledge check.
After completing this module, students will be able to:
– Describe the typical sales lifecycle process looks like and how an organization might use it to manage their sales.
– Describe the tools provided in Dynamics 365 Sales to assist organizations in creating, managing, and qualifying potential sales leads.
– Describe the process for creating and managing opportunities.
– Describe how Dynamics 365 Sales uses business process flows to provide sellers assistance while managing sales opportunities.
– Describe the options available for building and delivering quotes using Dynamics 365 Sales.
– Describe Sales Accelerator.
– Describe how to use orders and invoices.

Module 6: Describe Dynamics 365 Sales capabilities and related apps
This module introduces learners to sales forecasting, LinkedIn Sales Navigator and Dynamics 365 Sales Insights and Microsoft Sales Copilot
Lessons
– Introduction
– Identify additional Dynamics 365 Sales capabilities and related apps.
– Explore a Dynamics 365 Sales related apps business scenario.
– Describe sales pipeline and forecasting concepts.
– Describe use cases for and capabilities of Sales Insights.
– Describe use cases for and capabilities of LinkedIn Sales Navigator.
– Describe the Dynamics 365 Sales mobile app.
– Describe Microsoft Sales Copilot.
– Knowledge check.
After completing this module, students will be able to:
– Identify cases where additional sales apps could be leveraged.
– Examine the sales pipeline and forecasting available in Dynamics 365 Sales.
– Describe the capabilities of Dynamics 365 Sales Insights.
– Describe the capabilities of LinkedIn Sales Navigator.

- Examine the Dynamics 365 Sales mobile application.
- Describe the capabilities of Microsoft Sales Copilot.

Module 7: Explore Dynamics 365 Customer Service

This module introduces learners to Dynamics 365 Customer Service, focusing on core elements such as case lifecycle, queues, service-level agreements, knowledge management, and Copilot.

Lessons

- Introduction
- Describe use cases for Dynamics 365 Customer Service
- Explore a Dynamics 365 Customer Service business scenario
- Describe the case lifecycle including service-level agreements (SLAs) and entitlements
- Describe the functionality for workload management
- Describe knowledge management in Dynamics 365 Customer Service
- Describe use cases for Copilot in Dynamics 365 Customer Service
- Module assessment
- Summary and resources

After completing this module,

students will be able to:

- Identify use cases for Dynamics 365 Customer Service.
- Explain the case lifecycle including service level agreements and entitlements.
- Describe the functionality for workload management.
- Describe knowledge management.
- Describe how Copilot is used in Dynamics 365 Customer Service.

Module 8: Describe Dynamics 365 Customer Service capabilities and related apps

This module introduces learners to Omnichannel for Customer Service, reporting and data visualization and Dynamics 365 Customer Voice for Dynamics 365 Customer Service.

Lessons

- Introduction.
- Explore a Dynamics 365 Customer Service-related apps business scenario.
- Describe Omnichannel for Customer Service.
- Describe Omnichannel Supervisor Experiences.
- Describe Dynamics Customer Voice use cases for customer service.
- Describe reporting and data visualization options in Dynamics 365 Customer Service.
- Knowledge check.

After completing this module,

students will be able to:

- Describe Omnichannel for Dynamics 365 Customer Service.
- Describe Omnichannel Supervisor Experiences.
- Explain reporting and visualization options in Dynamics 365 Customer Service.
- Describe Dynamics 365 Productivity Tools app.

Module 9: Explore Dynamics 365 Field Service

This module introduces learners to Dynamics 365 Field Service, focusing on work orders, inspections and the Field Service mobile app.

Lessons

- Introduction
- Describe use cases for Dynamics 365 Field Service
- Explore a Dynamics 365 Field Service business scenario
- Describe the work order lifecycle
- Describe incident types and service tasks
- Describe Copilot in Field Service

- Describe inspections in Dynamics 365 Field Service
- Describe the Dynamics 365 Field Service mobile app
- Describe the Dynamics 365 Field Service app for Outlook for work order creation and scheduling
- Module assessment
- Summary and resources

After completing this module, students will be able to:

- Describe a typical field service lifecycle.
- Examine the lifecycle of a work order.
- Explain inspections.
- Describe the Field Service mobile app.

Module 10: Describe Dynamics 365 Field Service scheduling capabilities and related apps

This module introduces learners to the scheduling capabilities of Dynamics 365 Field Service. It also discusses asset management and Connected Field Service.

Lessons

- Introduction.
- Describe resource and scheduling processes.
- Explore a Dynamics 365 Field Service-related apps business scenario.
- Describe asset management and customer assets.
- Describe Connected Field Service for Dynamics 365.
- Knowledge check.

After completing this module,

students will be able to:

- Describe the scheduling capabilities available in Dynamics 365 Field Service.
- Schedule qualified resources.
- Describe the asset management capabilities available.
- Explain the relationship between Customer Assets and Connected Field Service.

ASSOCIATED CERTIFICATIONS & EXAM

This course will prepare delegates to write the Microsoft MB-910: Microsoft Dynamics 365 Fundamentals (CRM) exam.

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