

AB-6003-A: Introduction to sales in Dynamics 365

OEM: Microsoft • Duration: 1 Day (8 hrs) • Code: AB-6003-A

COURSE MODULES & TOPICS

Introduction to sales in Dynamics 365

Describe the foundations of Dynamics 365 customer engagement apps

- Introduction
- Describe customer engagement apps
- Describe cross functionality customer engagement apps
- Navigate customer engagement apps
- Describe timeline dynamics 365 customer engagement
- Exercise
- Explore prompting dynamics 365 apps copilot chat
- Describe security dynamics 365 customer engagement apps
- Describe ai form filling assistant
- Manage daily actions communications assistant
- Knowledge check
- Summary

Explore lead generation in Dynamics 365

- Introduction
- Describe use cases customer insights journeys
- Describe lead generation nurturing
- Describe segments
- Describe marketing email
- Describe forms
- Describe journeys
- Exercise build use lead nurturing journey template
- Exercise create customer journeys
- Describe event management
- Knowledge check
- Summary

Explore lead qualification in Dynamics 365

- Introduction
- Describe use cases dynamics 365 sales

- Describe lead opportunity process
- Describe use ai sales prospect
- Describe work list sequences
- Describe use sales qualification agent prospect
- Describe sales research agent prospect
- Describe use sales microsoft 365 copilot prospect
- Exercise
- Explore sales mobile app
- Describe linkedin sales navigator
- Describe full ai assisted lead qualification process
- Knowledge check
- Summary

Identify customer needs and explore relationships in Dynamics 365

- Introduction
- Describe sales close agent
- Describe sales close agent research
- Describe sales close agent engage
- Describe sales research agent
- Explore ai agents pipeline analysis
- Describe copilot microsoft 365
- Describe focused view
- Describe collaboration microsoft teams
- Knowledge check
- Summary

Explore how to negotiate deal terms and address objections in Dynamics 365 Sales

- Introduction
- Describe copilot sales negotiation
- Describe product catalog
- Describe sales close agent negotiation
- Describe sales research agent negotiation
- Describe microsoft 365 copilot negotiation
- Describe ai assisted deal negotiation process
- Knowledge check
- Summary

Describe how to close customer deals in Dynamics 365

- Introduction
- Describe sales close research agent
- Describe sales close agent engage mode
- Describe sales research agent closing
- Describe sales microsoft 365 copilot closing
- Review sales close process

- Knowledge check
- Summary

Describe sales account management in Dynamics 365

- Introduction
- Describe core capabilities customer insights data
- Describe unified customer profiles
- Describe measures segments predictions
- Describe churn risk prediction customer lifetime value
- Describe consume customer insights data
- Describe copilot sales account management
- Describe sales research agent
- Knowledge check
- Summary

Explore forecasting, pipeline management, and analytics in Dynamics 365 Sales

- Introduction
- Describe forecasting
- Describe pipeline management
- Describe relationship intelligence analytics
- Describe monitor agents
- Describe copilot forecasting reporting
- Describe sales qualification agent
- Describe sales close agent
- Exercise supervisor workflow
- Knowledge check
- Summary

Describe shared capabilities in Dynamics 365 customer engagement apps

- Introduction
- Describe options tailoring apps
- Enhance apps power platform
- Describe reporting capabilities
- Describe integrations
- Enhance productivity copilot
- Describe autonomous agents
- Knowledge check
- Summary