



AB-6003: Introduction to sales in Dynamics 365

Course ID #: 7000-1184-ZZ-Z

Hours: 7

Delivery Method: Group Internet Based

Course Content

Description:

This course will teach you how to enhance and automate business processes using customer engagement apps for Dynamics 365, while incorporating native interconnectivity with Microsoft 365. You will also learn to unify profiles, tailor personalized customer journeys with AI-assisted Dynamics 365 Customer Insights, and improve selling efficiency through AI-driven Sales features within Dynamics 365 Sales.

Prerequisites:

None

Target Audience:

This course is designed for professionals who aim to enhance and automate business processes using Dynamics 365 customer engagement apps, while leveraging native interconnectivity with Microsoft 365. It is ideal for those looking to unify profiles, create personalized customer journeys with AI-assisted Dynamics 365 Customer Insights, and improve selling efficiency through AI-driven Sales features.

Topics:

Describe the foundations of Dynamics 365 customer engagement apps

- Introduction
- Describe customer engagement apps in Dynamics 365
- Describe the cross-solution capabilities of customer engagement apps
- Navigate to and within customer engagement apps
- Describe the Timeline feature in customer engagement apps
- Exercise - Navigate Dynamics 365 apps
- Explore prompting in Dynamics 365 apps with Copilot Chat
- Describe security in customer engagement apps
- Describe the AI form filling assistant
- Manage daily actions with the communications assistant
- Module assessment
- Summary



AB-6003: Introduction to sales in Dynamics 365

Course ID #: 7000-1184-ZZ-Z

Hours: 7

Delivery Method: Group Internet Based

Explore lead generation in Dynamics 365

- Introduction
- Describe use cases for Customer Insights - Journeys
- Describe lead generation and nurturing
- Describe segments
- Describe marketing email
- Describe forms
- Describe journeys
- Exercise - Build and use a lead nurturing journey template
- Simulation - Create a customer journey
Describe event management
- Knowledge check
- Summary

Explore lead qualification in Dynamics 365

- Introduction
- Describe use cases for Dynamics 365 Sales
- Describe the lead to opportunity process
- Describe using AI in sales prospecting
- Describe the work list and sequences
- Describe the use of the Sales Qualification Agent in prospecting
- Describe the Sales Research Agent in prospecting
- Describe the use of Sales in Microsoft 365 Copilot in prospecting
- Exercise - Work with the Sales Accelerator Work List
- Explore the Sales mobile app
- Describe LinkedIn Sales Navigator
- Describe the full AI-assisted lead qualification process
- Knowledge check
- Summary

Identify customer needs and explore relationships in Dynamics 365

- Introduction
- Describe use cases for Dynamics 365 Sales
- Describe the lead to opportunity process
- Describe using AI in sales prospecting
- Describe the work list and sequences
- Describe the use of the Sales Qualification Agent in prospecting
- Describe the Sales Research Agent in prospecting
- Describe the use of Sales in Microsoft 365 Copilot in prospecting
- Exercise - Work with the Sales Accelerator Work List
- Explore the Sales mobile app
- Describe LinkedIn Sales Navigator
- Describe the full AI-assisted lead qualification process
- Knowledge check
- Summary



AB-6003: Introduction to sales in Dynamics 365

Course ID #: 7000-1184-ZZ-Z

Hours: 7

Delivery Method: Group Internet Based

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

- Introduction
- Describe use cases for Dynamics 365 Sales
- Describe the lead to opportunity process
- Describe using AI in sales prospecting
- Describe the work list and sequences
- Describe the use of the Sales Qualification Agent in prospecting
- Describe the Sales Research Agent in prospecting
- Describe the use of Sales in Microsoft 365 Copilot in prospecting
- Exercise - Work with the Sales Accelerator Work List
- Explore the Sales mobile app
- Describe LinkedIn Sales Navigator
- Describe the full AI-assisted lead qualification process
- Knowledge check
- Summary

Describe how to close customer deals in Dynamics 365

- Introduction
- Describe use cases for Dynamics 365 Sales
- Describe the lead to opportunity process
- Describe using AI in sales prospecting
- Describe the work list and sequences
- Describe the use of the Sales Qualification Agent in prospecting
- Describe the Sales Research Agent in prospecting
- Describe the use of Sales in Microsoft 365 Copilot in prospecting
- Exercise - Work with the Sales Accelerator Work List
- Explore the Sales mobile app
- Describe LinkedIn Sales Navigator
- Describe the full AI-assisted lead qualification process
- Knowledge check
- Summary

Describe sales account management in Dynamics 365

- Introduction
- Describe use cases for Dynamics 365 Sales
- Describe the lead to opportunity process
- Describe using AI in sales prospecting
- Describe the work list and sequences
- Describe the use of the Sales Qualification Agent in prospecting
- Describe the Sales Research Agent in prospecting
- Describe the use of Sales in Microsoft 365 Copilot in prospecting
- Exercise - Work with the Sales Accelerator Work List
- Explore the Sales mobile app
- Describe LinkedIn Sales Navigator
- Describe the full AI-assisted lead qualification process
- Knowledge check
- Summary

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

- Introduction
- Describe use cases for Dynamics 365 Sales
- Describe the lead to opportunity process
- Describe using AI in sales prospecting
- Describe the work list and sequences
- Describe the use of the Sales Qualification Agent in prospecting
- Describe the Sales Research Agent in prospecting
- Describe the use of Sales in Microsoft 365 Copilot in prospecting
- Exercise - Work with the Sales Accelerator Work List
- Explore the Sales mobile app
- Describe LinkedIn Sales Navigator
- Describe the full AI-assisted lead qualification process
- Knowledge check
- Summary



AB-6003: Introduction to sales in Dynamics 365

Course ID #: 7000-1184-ZZ-Z

Hours: 7

Delivery Method: Group Internet Based

Describe shared capabilities in Dynamics 365 customer engagement apps

- Introduction
- Describe use cases for Dynamics 365 Sales
- Describe the lead to opportunity process
- Describe using AI in sales prospecting
- Describe the work list and sequences
- Describe the use of the Sales Qualification Agent in prospecting
- Describe the Sales Research Agent in prospecting
- Describe the use of Sales in Microsoft 365 Copilot in prospecting
- Exercise - Work with the Sales Accelerator Work List
- Explore the Sales mobile app
- Describe LinkedIn Sales Navigator
- Describe the full AI-assisted lead qualification process
- Knowledge check
- Summary

Register for this class by visiting us at:

www.tcworkshop.com or by calling us at 800-639-3535

NASBA CPE details are provided on the following pages.



AB-6003: Introduction to sales in Dynamics 365

Course ID #: 7000-1184-ZZ-Z

Hours: 7

Delivery Method: Group Internet Based

NASBA Information

Level: Intermediate

Advanced Preparation:

Attendance Requirement: To be awarded the full credit hours, you must sign in and attend the entire course.

Recommended Field(s) of Study: Computer Software and Applications

Recommended CPEs: 7.80

Policies: Course Registration, Cancellation, Refund, and Complaint Resolution

For more information regarding administrative policies such as complaint and program cancellation policies, please contact our offices at 800-639-3535 or visit us at: www.tcworkshop.com

Official National Registry Statement:

The Computer Workshop is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credits. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org

NOTE: Since our information is in multiple places on our website or in PDF format that is sent to clients, we have provided our normal course content with the NASBA Information added along with links to our policy page on the web. We will add our name to the Official National Registry Statement after we are approved.