



MB-280T02: Empower sellers with Dynamics 365 Sales

Course ID #: 7000-1079-ZZ-Z

Hours: 14

Course Content

Description:

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.

Target Audience:

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.

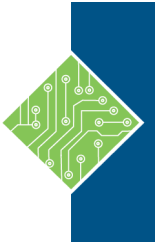
Topics:

Lesson 1: Work with Dynamics 365 Sales

- Create powerful customer experiences for organizations with Dynamics 365 apps
- Get started with Dynamics 365 Sales
- Set up and configure Dynamics 365 Sales
- Manage leads with Dynamics 365 Sales
- Manage opportunities with Dynamics 365 Sales
- Manage and organize your product catalog with Dynamics 365 Sales
- Process sales orders with Dynamics 365 Sales
- Configure forecasts in Dynamics 365 Sales
- Manage relationships with relationship selling in Dynamics 365 Sales
- Analyze Dynamics 365 sales data

Lesson 2: Set up and use the sales accelerator capabilities in Dynamics 365 Sales

- Set up Sales accelerator in Dynamics 365 Sales
- Create sales sequences with Sales Insights
- Work with segments in Dynamics 365 Sales accelerator
- Work with assignment rules in Dynamics 365 Sales accelerator
- Engage with customers through text messages in Dynamics 365 Sales



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Lesson 3: Implement goal management in Dynamics 365 Sales and Customer Service

- Define and track individual goals in Dynamics 365 Sales and Customer Service
- Use goal metrics in Dynamics 365 Sales and Customer Service

Lesson 4: Enhance Dynamics 365 Sales with tools and apps

- Use Microsoft 365 services with model-driven apps and Microsoft Dataverse
- Get started with the Dynamics 365 Sales mobile app

Lesson 5: Use Dynamics 365 Copilot for Sales

- Boost sales performance with Microsoft 365 Copilot for Sales
- Deploy and configure Microsoft 365 Copilot for Sales

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NASBA Information

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

Recommended Field(s) of Study:

Recommended CPEs: 15.60

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

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