Training: Microsoft

MB-280T02: Empower sellers with Dynamics 365 Sales

TRAINING GOALS:

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. Students will set up and configure lead and opportunity management strategies, organize their product catalog and process sales orders, leverage relationship selling features, the Sales accelerator, and Sales Insights. Students will also learn how to set up and deploy Microsoft Copilot for Sales.

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 and be familiar with the Dynamics 365 customer experience suite.

CONSPECT:

- Work with Dynamics 365 Sales
  - Module 1: Transform customer experiences with AI in Dynamics 365 apps
  - Module 2: Discover Dynamics 365 Sales as an AI-powered sales solution
  - Module 3: Set up and configure Dynamics 365 Sales
  - Module 4: Manage leads with Dynamics 365 Sales
  - Module 5: Manage opportunities with Dynamics 365 Sales
  - Module 6: Manage your product catalog with Dynamics 365 Sales
  - Module 7: Process sales orders with Dynamics 365 Sales
  - Module 8: Play well with others - relationship selling in Dynamics 365 Sales
  - Module 9: Use Dynamics 365 Sales Insights
  - Module 10: Manage and administer Dynamics 365 Sales
- Set up and use the sales accelerator capabilities in Dynamics 365 Sales
  - Module 1: Set up Sales accelerator in Dynamics 365 Sales
  - Module 2: Create sales sequences with Sales Insights
  - Module 3: Work with segments in Dynamics 365 Sales
  - Module 4: Work with notes and conversation intelligence

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- Module 5: Configure and view sales accelerator insights and reports
- Implement goal management in Dynamics 365 Sales and Customer Service
  - Module 1: Define and track individual goals in Dynamics 365 Sales and Customer Service
  - Module 2: Use goal metrics in Dynamics 365 Sales and Customer Service
- Enhance Dynamics 365 Sales with tools and apps
  - Module 1: Use Microsoft 365 services with model-driven apps and Microsoft Dataverse
  - Module 2: Get started with the Dynamics 365 Sales mobile app
- Use Dynamics 365 Copilot for Sales
  - Module 1: Boost sales performance with Sales in Microsoft 365 Copilot
  - Module 2: Deploy and configure Sales in Microsoft 365 Copilot

REQUIREMENTS:

Basic sales principles knowledge. Familiarity with Dynamics 365 customer experience suite including Sales and Customer Insights. Basic model-driven application configuration experience.

Difficulty level

CERTIFICATE:

The participants will obtain certificates signed by Microsoft (course completion).

This course will help prepare you for the **Microsoft Certified: Dynamics 365 Customer Experience Analyst Associate** certification exam (Exam MB-280), which is available through the Pearson VUE test centers.

TRAINER:

Microsoft Certified Trainer (MCT)

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