Introduction to sales in Dynamics 365 Training

Duration: **1 Day**

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What Can You Achieve with This Training?

- Learn how to use **Dynamics 365 customer engagement apps** to improve sales processes and customer relationship management.
- Explore **lead generation and personalised customer journeys** with **Dynamics 365 Customer Insights – Journeys**.
- Understand how **Dynamics 365 Sales** and AI-powered agents support **lead qualification, opportunity management, and deal closure**.
- Discover collaboration capabilities through **Microsoft 365 Copilot** and **Microsoft Teams** integration.
- Learn how **Customer Insights – Data** supports unified customer profiles, churn risk assessment, and **Customer Lifetime Value (CLV)** analysis.
- Become familiar with **sales forecasting, pipeline management, and analytics** supported by AI-driven insights.

The **Introduction to Sales in Dynamics 365 Training** introduces professionals to **Microsoft Dynamics 365 customer engagement applications** and explains how these solutions can improve, connect, and automate sales and customer relationship processes.

The course focuses on the **native integration between Dynamics 365 and Microsoft 365**, alongside the growing role of AI-powered capabilities in customer engagement.

Participants explore how customer information can be unified, how personalised customer journeys are developed, and how **Copilot and AI agents** can support activities throughout the sales lifecycle.

The programme begins with the core features of **Dynamics 365 Customer Engagement** applications, including navigation, security, communication tools, and AI-assisted capabilities.

It then introduces **Dynamics 365 Customer Insights – Journeys**, covering lead generation, customer segmentation, marketing emails, forms, and customer journey management.

The **Dynamics 365 Sales** modules focus on qualifying leads, converting leads into opportunities, using **Sales Accelerator**, and applying AI-supported prospecting and sales research tools.

Participants also examine how AI can support **identifying customer needs, developing relationships, negotiating deal terms, handling objections, and closing sales opportunities**.

The course introduces **Dynamics 365 Customer Insights – Data** for unifying customer profiles and analysing measures, segments, predictions, churn risk, and **Customer Lifetime Value (CLV)**.

Later modules address **sales forecasting, pipeline management, Relationship Intelligence, reporting, Microsoft Power Platform integration, and autonomous AI agents**.

Throughout the training, **hands-on exercises, simulations, module assessments, and knowledge**

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checks help learners connect product features with practical customer engagement and sales scenarios.

Prerequisites

There are **no specific prerequisites** for attending this course.

The programme is suitable for professionals who want to learn about **Dynamics 365 customer engagement applications** and AI-supported sales processes.

Who Should Attend

This course is designed for professionals who want to improve and automate business processes using **Dynamics 365 customer engagement applications**.

It is particularly suitable for:

- Professionals interested in improving **sales processes** through Dynamics 365
- Individuals who want to use **Microsoft 365 integration** to support customer interactions
- Participants interested in **unified customer profiles** and customer data analysis
- Professionals exploring **personalised customer journeys** with Dynamics 365 Customer Insights
- Individuals seeking to improve selling efficiency using **AI-driven Dynamics 365 Sales features**

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What You Will Learn

By the end of this course, participants will be able to:

- Describe the foundations and core features of **Dynamics 365 Customer Engagement** applications.
- Recognise navigation, security, and communication features within customer engagement apps.
- Understand AI-assisted capabilities such as **Copilot Chat**, form filling assistance, and communications assistance.
- Explain **lead generation and nurturing** with **Dynamics 365 Customer Insights – Journeys**.
- Understand how **segments, marketing emails, forms, and customer journeys** support customer engagement.
- Analyse the **lead qualification and lead-to-opportunity process** in Dynamics 365 Sales.
- Recognise the use of **Sales Accelerator Work List**, sequences, and AI-assisted prospecting.
- Explain the roles of **Sales Qualification Agent, Sales Research Agent, and Sales Close Agent**.
- Understand how **Microsoft 365 Copilot and Microsoft Teams** support customer engagement and collaboration.
- Explore AI-assisted approaches to **identifying customer needs, negotiating terms, and handling objections**.
- Describe how **Dynamics 365 Sales AI agents and Microsoft 365 Copilot** can support deal closure.
- Understand **unified customer profiles, measures, segments, and predictions** in Customer Insights – Data.
- Evaluate concepts such as **churn risk prediction** and **Customer Lifetime Value (CLV)**.
- Recognise the capabilities of **sales forecasting, pipeline management, and Relationship Intelligence**.
- Explain the role of **Microsoft Power Platform and Microsoft 365 integrations** in customer engagement.
- Understand how **autonomous AI agents** can support Dynamics 365 sales and customer engagement processes.

Training Outline

1. Foundations of Dynamics 365 Customer Engagement Apps

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This module introduces the core structure, navigation, security, and AI-assisted tools available in **Dynamics 365 customer engagement applications**.

- Overview of **customer engagement apps** and their key features
- **Integration capabilities** and tools for customer interaction
- **Navigation** within customer engagement apps
- The **Timeline** feature
- **Security** in customer engagement apps
- **AI Form Filling Assistant**
- **Communications Assistant**
- **Copilot Chat prompting**
- **Exercise:** Navigate Dynamics 365 apps

2. Lead Generation in Dynamics 365

This module focuses on acquiring and nurturing leads using **Dynamics 365 Customer Insights – Journeys**.

- Use cases for **Customer Insights – Journeys**
- **Lead generation and nurturing**
- **Segments, marketing emails, and forms**
- **Customer journeys and event management**
- **Exercise:** Build and use a lead nurturing journey template
- **Simulation:** Create a customer journey

3. Lead Qualification in Dynamics 365

This module explores how leads are evaluated and developed into sales opportunities.

- Use cases for **Dynamics 365 Sales**
- The **lead-to-opportunity process**
- **AI in sales prospecting**
- **Work List** and **Sequences**
- **Sales Qualification Agent** and **Sales Research Agent**
- **Copilot** and **LinkedIn Sales Navigator**

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- **Exercise:** Work with the Sales Accelerator Work List

4. Identifying Customer Needs and Exploring Relationships

This module examines how AI-supported tools help sales professionals understand customer needs and strengthen relationships.

- **Sales Close Agent** and **Sales Research Agent**
- AI agents for **pipeline analysis, lead qualification, and opportunity engagement**
- **Copilot in Microsoft 365** for customer engagement
- **Focused View** in the sales process
- Collaboration with **Microsoft Teams**

5. Negotiating Deal Terms and Addressing Objections

This module introduces AI-assisted capabilities for evaluating deal terms and managing objections during sales negotiations.

- **Copilot in sales and negotiation**
- The **product catalog in Dynamics 365 Sales**
- **Sales Close Agent** and **Sales Research Agent** in negotiation
- **Microsoft 365 Copilot** in negotiation
- The **AI-assisted deal negotiation process**

6. Closing Customer Deals in Dynamics 365

This module explores how AI agents and Copilot support the final stages of the sales process.

- **Sales Close Research Agent** in closing
- **Sales Close Agent in Engage mode**
- **Sales Research Agent** in closing
- **Sales in Microsoft 365 Copilot** in closing
- Reviewing the **sales close process with AI assistance**

7. Sales Account Management in Dynamics 365

This module focuses on unified customer data, customer analytics, and AI-assisted account management.

- Core capabilities of **Dynamics 365 Customer Insights – Data**

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- **Unified customer profiles**
- **Measures, segments, and predictions**
- **Churn risk prediction** and **Customer Lifetime Value (CLV)**
- Using **Customer Insights – Data** in other applications
- **Copilot in Sales** for account management
- **Sales Research Agent** in account management

8. Forecasting, Pipeline Management, and Analytics

This module covers sales performance monitoring, forecasting, and AI-supported pipeline analysis.

- **Forecasting in Dynamics 365 Sales**
- **Pipeline management**
- **Relationship Intelligence and analytics**
- **Monitoring AI agents**
- **Copilot in Sales** for forecasting and reporting
- **Sales Qualification Agent** and **Sales Close Agent** in forecasting and reporting
- **Exercise:** Experience the supervisor workflow

9. Shared Capabilities in Dynamics 365 Customer Engagement Apps

This module explores common features for tailoring, integrating, and reporting within Dynamics 365 customer engagement applications.

- **Tailoring customer engagement apps** to business requirements
- **Microsoft Power Platform integration**
- Reporting with **charts, dashboards, and views**
- **Microsoft 365 integrations**
- **Copilot capabilities** in customer engagement apps
- **Autonomous agents in Dynamics 365**