

Microsoft Dynamics 365 Fundamentals Customer Engagement Apps (CRM) (MB-910T00)

COURSE OVERVIEW

Do you want to learn more about Dynamics 365? This course will provide you with a broad introduction to the customer engagement capabilities of Dynamics 365. You will become familiar with the concept of customer engagement, the core capabilities of customer engagement apps as well as with each of the customer engagement apps, including Dynamics 365 Marketing, Dynamics 365 Sales, Dynamics 365 Customer Service and Dynamics 365 Field Service. This course will include lecture as well as hands-on-labs.

WHO WILL BENEFIT FROM THIS COURSE?

The Microsoft Dynamics 365 Fundamentals (CRM) course is targeted to those looking to familiarize themselves with and gain a broad exposure to the marketing, sales, customer service, and field service capabilities of Dynamics 365.

This audience wants to explore the features and capabilities of Microsoft Dynamics 365 Marketing, Dynamics 365 Sales, Dynamics 365 Customer Service, and Dynamics 365 Field Service.

People in various roles and stages in their careers can benefit from this fundamentals course. The course is designed for IT professionals, business stakeholders, entrepreneurs, students, and people starting or changing careers who want to be exposed to the marketing, sales, customer service, and field service capabilities of Dynamics 365.

PREREQUISITES

An understanding of cloud computing is helpful but isn't necessary.

COURSE OBJECTIVES

Students will learn to:

- Describe the foundations of Dynamics 365 customer engagement apps
- Describe shared activities and integration options in Dynamics 365 customer engagement apps
- Explore Dynamics 365 Customer Insights - Journeys
- Describe Dynamics 365 Customer Insights - Data and Dynamics 365 Customer Voice
- Explore Dynamics 365 Sales
- Describe Dynamics 365 Sales capabilities and related apps
- Explore Dynamics 365 Customer Service
- Describe Dynamics 365 Customer Service capabilities and related apps
- Explore Dynamics 365 Field Service
- Describe Dynamics 365 Field Service scheduling capabilities and related apps



COURSE OUTLINE

Module 1: Describe the foundations of Dynamics 365 customer engagement apps

- Describe use cases for Dynamics 365
- Describe how the Microsoft Power Platform relates to Dynamics 365 apps
- Explain what Microsoft Dataverse is and how it is used by Dynamics 365 customer engagement apps
- Describe the different Dynamics 365 customer engagement apps
- Describe options for accessing Dynamics 365 customer engagement apps

Module 2: Describe shared activities and integration options in Dynamics 365 customer engagement apps

- Work with customers and manage activities
- Explore different reporting options
- Describe the available integration options

Module 3: Explore Dynamics 365 Customer Insights - Journeys

- Identify use cases for Dynamics 365 Marketing
- Explain email marketing
- Describe how to target customers with segments
- Explain how to create and leverage customer journeys in Dynamics 365 Marketing
- Describe lead generation and qualification

Module 4: Describe Dynamics 365 Customer Insights - Data and Dynamics 365 Customer Voice

- Describe when other marketing applications may be required
- Describe how to use Customer Insights - Data to create more targeted customer segments that can be brought into Dynamics 365 Customer Insights - Journeys
- Describe how to capture customer feedback with Customer Voice

Module 5: Explore Dynamics 365 Sales

- Describe the typical sales lifecycle process looks like and how an organization might use it to manage their sales
- Describe the tools provided in Dynamics 365 Sales to assist organizations in creating, managing, and qualifying potential sales leads
- Describe the process for creating and managing opportunities
- Describe how Dynamics 365 Sales uses business process flows to provide sellers assistance while managing sales opportunities
- Describe the options available for building and delivering quotes using Dynamics 365 Sales
- Describe how to use orders and invoices

Module 6: Describe Dynamics 365 Sales capabilities and related apps

- Identify cases where additional sales apps could be leveraged
- Examine the sales pipeline and forecasting available in Dynamics 365 Sales
- Describe the capabilities of Dynamics 365 Sales Insights
- Describe the capabilities of LinkedIn Sales Navigator
- Examine the Dynamics 365 Sales mobile application
- Describe the capabilities of Microsoft Viva Sales



Module 7: Explore Dynamics 365 Customer Service

- Identify use cases for Dynamics 365 Customer Service
- Explain the case lifecycle
- Examine how to manage queues
- Dynamics 365 Customer Service business process flows
- Describe Service-Level agreements (SLAs) and entitlements

Module 8: Describe Dynamics 365 Customer Service capabilities and related apps

- Describe Omnichannel for Dynamics 365 Customer Service
- Explain reporting and visualization options in Dynamics 365 Customer Service
- Describe Dynamics 365 Customer Voice use cases for Dynamics 365 Customer Service

Module 9: Explore Dynamics 365 Field Service

- Describe a typical field service lifecycle
- Examine the lifecycle of a work order
- Explain inspections
- Describe the Field Service mobile app

Module 10: Describe Dynamics 365 Field Service scheduling capabilities and related apps

- Describe the scheduling capabilities available in Dynamics 365 Field Service
- Schedule qualified resources
- Describe the asset management capabilities available
- Explain the relationship between Customer Assets and Connected Field Service

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