KOENIG SOLUTIONS · COURSE OUTLINE

Accelerate Seller Productivity

Learn to use Dynamics 365 Marketing, Sales, Commerce and Customer Insights to accelerate seller productivity.

5
MODULES

27
TOPICS

COURSE OVERVIEW

This course covers Dynamics 365 Marketing, including lead generation, customer journeys, segmentation and event management. It then covers Dynamics 365 Sales, including sales automation, pipeline management, contract management, the Microsoft Relationship Sales Solution and sales insights. It continues into Dynamics 365 Sales Insights configuration and use, followed by Dynamics 365 Commerce, covering assisted selling, merchandising, inventory, omnichannel management and fraud protection. It closes with Dynamics 365 Customer Insights and the Customer Data Platform.

WHO THIS COURSE IS FOR

- **Sales Representatives**
- **Marketing Professionals**
- **Sales Managers**
- **Customer Insights Analysts**
- **Commerce Managers**

LEARNING OBJECTIVES

- Explain the benefits and features of Dynamics 365 Marketing
- Apply lead generation and qualification techniques
- Describe the customer journey and segmentation capabilities
- Configure and manage event management in Dynamics 365 Marketing
- Manage the sales process, pipeline and contracts in Dynamics 365 Sales
- Identify the Microsoft Relationship Sales Solution and sales insights
- Configure Dynamics 365 Sales Insights and its assistant studio tutorials
- Describe Dynamics 365 Commerce areas like merchandising and fraud protection

COURSE SYLLABUS

5 Modules, 27 Topics

01

Dynamics 365 Marketing

TOPICS

- **Lesson 1:** The benefits of Dynamics 365 Marketing
- **Lesson 2:** Features and functionality of Dynamics 365 Marketing
- **Lesson 3:** Lead generation and qualifications
- **Lesson 4:** Customer journey
- Lesson 5: Segmentation
- **Lesson 6:** Event management

02

Dynamics 365 Sales

TOPICS

- **Lesson 1:** Dynamics 365 Sales automation
- **Lesson 2:** Manage the sales process and pipeline
- **Lesson 3:** Contract management
- **Lesson 4:** Discover Microsoft Relationship Sales Solution (MRSS)
- **Lesson 5:** Sales insights
- Lesson 6: Surveys
- **Lesson 7:** Dynamics 365 Product Visualize

03

Dynamics 365 Sales Insights

TOPICS

- **Lesson 1:** Overview of Dynamics 365 Sales Insights
- **Lesson 2:** Configure Dynamics 365 Sales Insights
- **Lesson 3:** Working with Dynamics 365 Sales insights
- **Lesson 4:** Assistant studio tutorials for Dynamics 365 Sales Insights

04

Overview of Dynamics 365 Commerce

TOPICS

- **Lesson 1:** Overview of Dynamics 365 Commerce
- **Lesson 2:** Dynamics 365 Commerce core functional areas
- **Lesson 3:** Assisted Selling
- **Lesson 4:** Merchandising and Inventory
- **Lesson 5:** Omnichannel and channel management
- **Lesson 6:** Dynamics 365 Fraud Protection

05

Overview of Dynamics 365 Customer Insights and Customer Data Platform

TOPICS

- **Lesson 1:** Overview of Dynamics 365 Customer Insights
- **Lesson 2:** Benefits of Dynamics 365 Customer Insights
- **Lesson 3:** Working with Dynamics 365 Customer Insights
- **Lesson 4:** Overview of Customer Data Platform (CDP)

NOTES

- Source lists a 'Case Study' section heading at the end of the document with no lessons or content beneath it.

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

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