

MB-280T02: Empower sellers with Dynamics 365 Sales

Course Duration: 16 Hours

Course code: MB-280T02

1. Course Overview

This course is designed for sales professionals and consultants looking to leverage Microsoft Dynamics 365 Sales to enhance their sales workflows, close deals more efficiently, and build stronger relationships. Participants will gain practical experience in navigating the Dynamics 365 Sales environment, managing leads and opportunities, automating key sales processes, and making data-driven decisions using embedded intelligence.

2. What you'll learn?

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

- How to configure and personalize the Dynamics 365 Sales interface for your organization
- Techniques for effectively managing leads, contacts, accounts, and opportunities
- How to automate sales processes using business process flows and workflows
- Ways to improve pipeline visibility and readiness using dashboards and reports
- Best practices for applying Microsoft's embedded sales insights and forecasting tools
- Strategies to enhance collaboration, mobile access, and productivity for sales teams

3. Target Audience

This course is ideal for:

- Sales professionals and managers aiming to optimize their use of Dynamics 365 Sales

- Sales operations specialists responsible for maintaining CRM best practices
- Functional consultants tasked with deploying or customizing Dynamics 365 Sales
- System administrators and IT staff supporting sales teams and ensuring smooth CRM operations

4. Pre-Requisites

Learners should have:

- A foundational understanding of sales concepts (e.g., lead generation, opportunity management)
- Basic familiarity with the Dynamics 365 platform or general CRM systems
- Practical experience using Microsoft Excel for data entry and analysis
- (Optional but beneficial) A basic understanding of Power Platform components such as Power Apps or Power Automate

5. Course content

Module 1: Getting Started with Dynamics 365 Sales

- Overview of the Sales Hub, navigation, and user personalization
- Setting up security roles, teams, and user access

Module 2: Managing Leads, Contacts, and Accounts

- Creating and qualifying leads, converting to contacts/accounts
- Best practices for managing the customer database

Module 3: Opportunity Management & Sales Pipeline

- Creating and tracking opportunities

- Configuring business process flows to support consistent sales execution

Module 4: Automating Sales Processes

- Designing workflows and automated tasks
- Using Power Automate for advanced process automation

Module 5: Sales Insights & AI-Driven Intelligence

- Leveraging predictive insights and lead scoring
- Utilizing email engagement and relationship analytics

Module 6: Dashboards, Reports & Forecasting

- Building and customizing dashboards and reports
- Pipeline forecasting and performance tracking

Module 7: Mobile & Collaboration Tools

- Working with Dynamics 365 mobile apps and embedded Office 365 tools
- Integrating Teams and Outlook for seamless collaboration

Module 8: Administration & Best Practices

- Data import/export, system settings, and solutions
- Maintaining data quality, security, and user adoption strategies