CRM 2016 Applications Certification Bootcamp

Varighet: 2 Days   Kurskode: T4CRM057

Beskrivelse:

This course is a comprehensive bootcamp to pass the Microsoft Dynamics Application exam MB2-704. The bootcamp includes exam preperation classes and skpype sessions, and the MB2-704 exam with up to 4 free retakes. This course introduces the capabilities of Sales Management in Microsoft Dynamics CRM 2016 that allow you to track and manage the sales process from potential to close. Provides insight on sales process information. Introduces the tools available to analyze and report on sales information. Focuses on how an organization can nurture customer satisfaction through automation of business processes within Microsoft Dynamics CRM 2016. Provides an insight into all of the powerful Customer Service and Service Scheduling functionality capabilities within Microsoft Dynamics CRM 2015. Guides you through the process of working with your customers in Microsoft Dynamics CRM 2016, including: resolution of customer complaints and services issues cost effectively, and provides insight on managing all related correspondence, documents, contacts and conversations.

Målgruppe:

This course is intended for individuals that plan to implement, use, maintain, or support Microsoft Dynamics CRM 2016 in their organization. The training is intended for sales representatives, customer service representatives, service schedulers, administrators, office managers, CEOs, and consultants who want to gain foundational knowledge of the application functionality.

Agenda:

- Understand the context of Sales Management and review real-life sales scenarios.
- Identify how the various elements of the Microsoft Dynamics CRM 2016 Sales fit together.
- Review the basic terminology used throughout the application.
- Review how the basic flow of sales activity in Microsoft Dynamics CRM begins with the entry of leads, and review ways to manage leads in Microsoft Dynamics CRM.
- Identify the role of leads, and when they can be used.
- Know the Lead to Opportunity process and the roles of these records.
- Work with Sales Literature in Microsoft Dynamics CRM.
- Explore the steps to create and maintain Competitors.
- Identify the features and benefits of the product catalog.
- Create and maintain unit groups for the product catalog.
- Add products to the product catalog, and describe the use of kit products and substitute products.
- Create price lists and configure as appropriate for different customers, marketing campaigns and special offers.
- Set up different price lists for different types of customers and marketing campaigns.
- Utilize the tools to available within Microsoft Dynamics CRM to capture important sales information and uncover new business opportunities.
- Identify how Goal Management enables organizations to manage and analyze performance.
- Use the Sales Analysis tools that Microsoft Dynamics CRM provides analyze and report on sales-related information
- Identify the key set of terms, phrases and elements to effectively work with Customer Service Scenarios and Terminology
- Recognize why cases are the fundamental record type in service management, and represent a single incident of service.
- Use Queues to organize and store Activities and Cases that are waiting to be processed.
- Effectively search the Knowledge Base to access a repository of informational articles used to assist customer service representatives in the resolution of cases.
- Utilize Contract Management to specify the amount of support services a customer is entitled to.
- Use reporting functionality to gain insight into trends, performance, and identifying opportunities and potential issues.
- Practice Goal Management features to establish and track progress against target values for key performance indicators.
- Use the Service scheduling functionality and how it is designed to assist organizations when providing services that require complex combinations of resources.

Forkunnskaper:

- General knowledge of Microsoft Windows.
- General knowledge of Microsoft Office.
- An understanding of Customer Relationship Management solution processes and practices.

Innhold:

DAY 1

Module 1: Microsoft Dynamics CRM Concepts

- Microsoft Dynamics CRM functionality
- Microsoft Dynamics CRM clients
- Microsoft Dynamics CRM records
- Application navigation

Module 2: Working with the Application

- Customer records
- Addresses
- Personal options

Module 3: Introduction to Sales Management

- Customer Scenarios
- Basic Record Types

Module 4: Lead Management

- Lead to Opportunity Process Form and Process Ribbon
- Convert Activity Records to Leads
- Qualifying and Disqualifying Leads
- Create, Maintain, and Use Sales Literature
- Create, Maintain, and Use Competitors
- Lab: Create and Disqualify a Lead

Module 5: Working with Opportunity Records

- Create Opportunities and Work with Opportunity Form
- Changing Opportunity Status
- Lab: Managing Sales Opportunities
- Create, work with, close, and reopen Opportunity records.
- Describe the different statuses of an opportunity.
- Use the assign functionality in Microsoft Dynamics to assign opportunities to other users.
- Manage opportunities from system views.

Module 6: Working with the Product Catalog

- The Microsoft Dynamics CRM Product Catalog
- Unit Groups
- Adding and Maintaining Products
- Creating, Maintaining and Using Price Lists
- Currency Management
- Creating a Price List
- Lab: Managing the Product Catalog
- Create Currency
- Create a Unit Group associated with the Currency
- Create a Product Create a Price List and Price List Item Tied to the Currency

Module 7: Sale

s Order Processing

- Adding Line Items (Opportunity Products) to Opportunities
- Quote Management
- Working with Orders
- Working with Invoices
- Lab: Sales Order Process

Module 8: Metrics and Goals

- Configuring Goal Metrics
- Configuring Fiscal Periods
- Creating and Assigning Goal Records
- Creating and Recalculating Parent and Child Goal Records
- Creating a Rollup Query
- Lab : Goal Management for Individuals
- Implement a Goal Metric

Module 9: Sales Analysis

- Running Built-in Reports
- Exporting Sales Information to Excel
- Working with Charts and Dashboards
- Working with System Charts from the Opportunity List
- Working with Dashboards
- Create a New Dashboard in the Workplace
- Sharing DASHBOARDS, Charts and Advanced Find Queries
- Lab: Create a New Personal, Sales Dashboard
- Create an advanced find query
- Create a chart.
- Create a dashboard, and add the advanced find query and chart to it.
- Share the dashboard.

Module 10: NEW IN CRM 2016 SALES AND MARKETING!

- Use of pre-formatted Excel templates to quickly create Excel documents directly from CRM
- One click easy generation of documents from CRM using role based pre-defined Word templates
- SMS marketing including inbound and outbound campaigns
- Next generation Cortana integration for sales teams
- Interactive generation of HTML in emails
- New CRM app for Outlook included expand support to include Firefox, Safari for Mac and Outlook for Mac ......and lots more new features we can reveal when CRM 2016 ships!

DAY 2

Module 2: Cases

- Creating Case Records
- Understanding the Process Ribbon and Menu Options
- Case Resolution, Canceling and Deleting
- Assigning Case Records
- Other Actions on Cases From Forms and Views
- Working with the Subject Tree
- Working with the Case List and Views
- Lab: Case Resolution Processing
- Create a case
- Associate a phone call with the case
- Resolve the case

Module 3: Knowledge Base

- Article Templates
- Creating, Approving and Publishing Articles
- Using and Searching the Knowledge Base
- Cases and Knowledge Base Articles
- Sending Knowledge Base Articles
- Lab: Managing Knowledge Base Articles
- Create, Submit, and Publish a Knowledge Base Article.

Module 4: Queue Management

- Queue Management
- Lab: Create and Manage Queues
- Create a New Public Queue for Incoming Questions

Module 5: Contracts

- Contracts and Contract Templates
- Creating and Working with Contracts
- Using Contracts with Cases
- Lab: Resolving a Case with a Contract
- Create a Contract Template
- Create a Contract using a Contract Template
- Open a case and associate a contract
- Create and Close an Appointment Activity a With the Case
- Resolve the Case

Module 6: Analysis, Reports and Goals

- Customer Service Reports
- Customer Service Charts and Dashboards
- Customer Service Goals and Metrics
- Lab : Goals and Goal Metrics
- Modify a Goal Metric to Include in-Progress Cases

Module 7: Service Scheduling

- Service Scheduling Scenarios
- Service Scheduling Terminology
- Service Scheduling Process
- Resources, Services and Selection Rules

Module 1: Introduction to Services Management

- Customer Scenarios
- Customer Service Entities and Record Types

- Include Customer Preferences
- Understand Sites and Same-Site Requirements
- Manage Business Closures
- Explain the Service Activity Scheduling Engine
- Working with Service Activities and the Service Calendar
- Close, Cancel, or Reschedule a Service Activity
- Lab: Schedule a Service by Using a Same-Site Requirement
- Create a Service Activity based on a Same-Site Requirement Service.

Module 8: New in CRM 2016 Services

- New interactive service hub dashboards and forms help you prioritize workloads Use of pre-formatted Excel templates to quickly create Excel documents directly from CRM.
- One click easy generation of documents from CRM using role based pre-defined Word templates.
- Next generation Cortana integration for service teams.
- Interactive generation of HTML in emails.

Ytterligere informasjon:

For mer informasjon eller kursbooking, vennligst ring oss 22 95 66 00

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