

Accelerate sales pipelines with AI in Dynamics 365 (AB-210)

Duration: 3 Days **Course Code:** M-AB210 **Delivery Method:** Virtual Learning

Overview:

Accelerate sales outcomes by leveraging AI-driven insights and automation within Dynamics 365 to optimise pipelines and customer engagement.

This course teaches learners how to design, configure, and govern AI enhanced sales solutions using Dynamics 365 Sales, Microsoft Copilot, and AI agent capabilities to support sellers across the lead to cash process. Learners translate business requirements into practical, AI first seller workflows that improve productivity, forecasting accuracy, and decision making while aligning with organizational revenue goals, governance standards, and responsible AI practices.

Virtual Learning

This interactive training can be taken from any location, your office or home and is delivered by a trainer. This training does not have any delegates in the class with the instructor, since all delegates are virtually connected. Virtual delegates do not travel to this course, Global Knowledge will send you all the information needed before the start of the course and you can test the logins.

Target Audience:

This course is designed for professionals who want to learn how to build AI-enhanced sales solutions using Dynamics 365 Sales, Microsoft Copilot, and AI agents. It is ideal for students who want to understand how modern sales teams use AI to manage leads, opportunities, forecasting, and seller productivity. Learners may have a general understanding of sales processes or Dynamics 365 but are looking to develop the skills needed to translate business requirements into practical, AI-powered sales workflows while following governance and responsible AI practices.

Objectives:

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| <ul style="list-style-type: none"> ■ After this course participants should be able to: ■ Understand how AI enhances sales processes within Dynamics 365 ■ Leverage AI-driven insights to identify and prioritise high-value opportunities ■ Optimise sales pipelines using predictive analytics and automation | <ul style="list-style-type: none"> ■ Enhance customer engagement through data-driven personalisation ■ Automate routine sales tasks to improve efficiency and productivity ■ Use intelligent recommendations to guide next-best actions and decisions ■ Analyse sales performance and pipeline health using AI-powered tools |
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Prerequisites:

Participants should have:

- Basic understanding of sales concepts and processes
- Familiarity with Dynamics 365 Sales or the Dynamics 365 customer experience suite
- General awareness of business applications and CRM workflows
- Foundational knowledge of AI concepts is helpful but not mandatory

Testing and Certification

None

Follow-on-Courses:

None

Content:

Module 1: Configure Dynamics 365 Sales for AI-powered selling

- Transform customer experiences with AI in Dynamics 365 apps
- Discover Dynamics 365 Sales as an AI-powered sales solution
- Set up and configure Dynamics 365 Sales

Module 2: Generate and qualify leads using AI in Dynamics 365 Sales

- Nurture and generate leads in Dynamics 365 Sales
- Qualify leads using the Sales Qualification Agent in Dynamics 365 Sales
- Engage with customers through text messages in Dynamics 365 Sales

Module 3: Win deals with AI-powered sales execution in Dynamics 365 Sales

- Set up the product catalog in Dynamics 365 Sales
- Manage opportunities and process sales orders in Dynamics 365 Sales
- Close deals using AI agents in Dynamics 365 Sales
- Analyze sales performance using AI, forecasting, and dashboards in Dynamics 365 Sales

Module 4: Extend Dynamics 365 Sales with AI and Power Platform tools

- Get started with the Dynamics 365 Sales mobile app
- Use Microsoft 365 services with model-driven apps and Microsoft Dataverse

Extend Dynamics 365 apps with Power Platform and Copilot Studio

Further Information:

For More information, or to book your course, please call us on Head Office 01189 123456 / Northern Office 0113 242 5931

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