

Applications Training in Microsoft Dynamics CRM 2011 Three Day – Instructor Led

Day 1 - Sales Management in CRM 2011; Course # 80291

Introduction

This training introduces the capabilities of Sales Management in Microsoft Dynamics CRM that allow you to track and manage the sales process from potential to close. It provides insight on using the Product Catalog and process sales information. It also introduces some of the tools used to analyze and report on sales information.

Audience

This training is designed for new partners and customers of Microsoft Dynamics CRM that want to learn about the available sales features in the Microsoft Dynamics CRM product.

At Training Material Completion

After completing this training, individuals will be able to:

- ✓ Gain a conceptual understanding of the Microsoft Dynamics CRM sales process
- ✓ Understand the role of the core record types used in Sales Management
- ✓ Discuss when to use leads to qualify or disqualify opportunities
- ✓ Use process dialogs to automate lead and opportunity management
- ✓ Use the Product Catalog
- ✓ Create Price Lists for campaigns and special offers
- ✓ Create orders, quotes and track order fulfillment
- ✓ Use Lists, Views and Charts to obtain important sales information
- ✓ Work with and create dashboards

Prerequisites

Before reviewing this training, individuals must have:

- ✓ General working knowledge of customer relationship management
- ✓ General understanding of business processes
- ✓ General working knowledge of Microsoft Window

Applications Training in Microsoft Dynamics CRM 2011 Three Day – Instructor Led

Marketing Automation in CRM 2011; Course # 80290

Introduction

This training introduces you on how to use Microsoft Dynamics CRM to extend the effectiveness of your marketing department and provides context of how to use things such as marketing campaigns, marketing lists, and campaign templates in Microsoft Dynamics CRM. It also discusses the role of campaign activities and marketing lists in campaigns and discusses how to associate sales literature, target products and price lists with marketing campaigns.

Audience

This training is designed for new partners and customers of Microsoft Dynamics CRM that want to learn about the available marketing features in the Microsoft Dynamics CRM product.

At Training Material Completion

After completing this training, individuals will be able to:

- ✓ Examine the benefits of closed loop marketing
- ✓ Create and use marketing lists
- ✓ Introduce quick campaigns and marketing campaigns
- ✓ Plan marketing campaigns and create and use templates
- ✓ Import leads
- ✓ Associate sales literature, target products and price lists with marketing campaigns
- ✓ Capture and manage campaign responses
- ✓ Create and manage sales goals for individuals and teams within your organization
- ✓ Use Personal Charts, System Charts, and Dashboards to analyze marketing information

Prerequisites

Before reviewing this training, individuals must have:

- ✓ General working knowledge of customer relationship management
- ✓ General understanding of business processes
- ✓ General working knowledge of Microsoft Windows.

Applications Training in Microsoft Dynamics CRM 2011

Three Day – Instructor Led

Day 2 - Marketing Automation in CRM 2011, Continued.

Service Management in CRM 2011; Course # 80292

Introduction

This training introduces Microsoft Dynamics CRM service management functionality and explains how it helps organizations track information about cases, customer complaints or requests, and small projects. You will learn how to use the knowledge base and discusses how organizations can browse, locate, and share information in the repository. It also discusses how to create, manage and use teams and queues in Microsoft Dynamics CRM.

Audience

This training is designed for new partners and customers of Microsoft Dynamics CRM that want to learn about the available service management features in the Microsoft Dynamics CRM product.

At Training Material Completion

After completing this training, individuals will be able to:

- ✓ Use some of the most common service management applications of Queues and Contracts.
- ✓ Work with cases in the case grid.
- ✓ Understand the steps required to create a new case.
- ✓ Create and manage contract templates.
- ✓ Create and manage contracts.
- ✓ Add contract lines to a contract.
- ✓ Associate contracts with cases.
- ✓ Create, activate and deactivate, and delete Knowledge Base article templates.
- ✓ Search articles from within a case record and utilize articles to resolve cases.
- ✓ Create, manage and work with Teams.
- ✓ Define steps involved in creating and managing queues.
- ✓ Work with queue items.
- ✓ Build personal and system charts and dashboards to provide insight into important service management information.

Prerequisites

Before reviewing this training, individuals must have:

- ✓ General working knowledge of customer relationship management
- ✓ General understanding of business processes
- ✓ General working knowledge of Microsoft Windows.

Applications Training in Microsoft Dynamics CRM 2011 Three Day – Instructor Led

Day 3 – Service Management in CRM 2011, Continued.

Service Scheduling in CRM 2011; Course # 80293

Introduction

This training discusses the scheduling process, scheduling engine, and scheduling service activities in detail since they are key entry points in the scheduling process. It also discusses how to use service scheduling in situations that have complex scheduling requirements.

Audience

This training is designed for new partners and customers of Microsoft Dynamics CRM that want to learn about the available service scheduling features in the Microsoft Dynamics CRM product.

At Training Material Completion

After completing this training, individuals will be able to:

- ✓ Identify key service scheduling concepts
- ✓ Compare service scheduling business scenarios
- ✓ Understand the service scheduling process flow
- ✓ Set up work schedules for users, facilities or equipment
- ✓ Close, cancel or reschedule a service activity
- ✓ Learn how service activity records synchronize with Microsoft Office Outlook
- ✓ Incorporate customer preferences when scheduling service activities

Prerequisites

Before reviewing this training, individuals must have:

- ✓ General working knowledge of customer relationship management
- ✓ General understanding of business processes
- ✓ General working knowledge of Microsoft Windows.