Microsoft Dynamics CRM
Training Guide

www.preact.co.uk
Tel: 0800 381 1000 or +44(0)1628 661810

Microsoft Partner
Gold  Customer Relationship Management
If you’re new to Microsoft Dynamics CRM, or you want to develop your user skills, Preact have a course to match your requirements.

This guide features examples of courses that our team deliver and it includes a series of recommendations to help you get the most from your training.

Preact have trained CRM users since 1993 and as a gold accredited Microsoft CRM consultancy you can be sure of working with a leading partner.

Our courses are delivered on-site, or from our office in Maidenhead, as private sessions that are fully bespoke to your CRM processes and training needs. We’ll share insight and show you how to maximise the benefits of Microsoft Dynamics.

We’re committed to ensuring that your training aims are fully achieved. As part of our preparation the consultant who will deliver your training will phone several days in advance to confirm a course structure so we can accelerate the skills transfer.

With options for group and one-to-one tuition, job role specific courses and train the trainer sessions we’re sure to have a training solution for you.

Call us on 0800 381 1000 to discuss your training requirements.

Ian Mennie
Technical Operations Director
**Microsoft Dynamics CRM**

**CRM Introduction Training**

An introduction to Microsoft Dynamics to empower new CRM users enabling teams to quickly master the application’s main processes and interface.

Our suggested introduction course includes:

- Navigating Microsoft Dynamics CRM
- Introducing key Microsoft Dynamics CRM modules and functions
- Using the Getting Started Pane
- Working with Dynamics CRM in Outlook
- Creating personalised CRM views
- How to search and find CRM data
- The relationship between account, contact and lead records
- CRM record ownership and sharing access
- Creating and managing CRM records and activities
- How to progress sales prospects from a lead to order
- Tracking customer service issues using CRM cases
- Working with CRM dashboards, reports and charts
- Using Microsoft Dynamics CRM Help and the Resource Center
Microsoft Dynamics CRM

Sales User Training

This role based course focuses on the sales management capabilities of Microsoft Dynamics CRM.

We’ll feature the processes and functions used by sales teams to improve process efficiency for shortening sales cycles, reducing administration and improving the quality of sales forecasting.

Our recommended CRM sales training content includes:

- Working with the core CRM record types used in sales management
- Qualifying and disqualifying leads and opportunities
- Working with CRM product tables
- Progressing leads and opportunities using CRM process flows
- How to create personalised CRM sales views
- Adapting CRM processes to match your methodology including stage gating and other defined sales rules
- Creating sales quotes and orders
- How to customise CRM lists, charts and dashboards to review sales data
- How to apply automated CRM sales workflows
Microsoft Dynamics CRM
Marketing User Training

In this course for marketing teams we provide tuition to utilise the campaign management and lead generation functions of Microsoft Dynamics CRM.

We’ll focus on the processes to create new campaigns in CRM, plan activities, develop lists and measure the results.

Our marketing content can include:

- Introducing the main CRM marketing campaign functions
- How to build and manage static and dynamic lists
- Creating and executing new marketing campaigns
- Using with CRM quick campaigns
- Developing campaign templates
- Importing leads
- Capturing CRM campaign responses
- Assigning campaign activities
- How to manage dotMailer email marketing data in CRM (if already integrated)
- Working with CRM reports to measure performance
- Using CRM marketing goals to benchmark campaign results

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CRM Service Management Training

Designed for customer service and support teams this course will show you how to use Microsoft Dynamics CRM to improve service delivery and increase client retention.

We’ll focus on the Dynamics CRM case management module and how these functions are used to track and resolve client issues. We’ll also highlight examples of CRM automation to reduce administration and develop more efficient service processes.

Our CRM service management content includes:

- Using Dynamics CRM to create customer service cases
- How to progressing service cases using CRM process flows
- Managing cases in personalised CRM list views
- Customising service dashboards and charts
- Understanding case queues and automating case routing
- Configuring automated service emails
- Working with CRM entitlements to define support levels
- Applying service level agreements and case escalation processes
- Using Dynamics CRM to manage contracts and renewals
- How to use CRM dialogs for workflow led call scripting
- Introducing the Dynamics CRM knowledge base module
- Using CRM to track performance with customer service goals

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CRM Power User Training

An intermediate course for Dynamics CRM power users who want to understand the application’s advanced functions and processes.

This course is an alternative to our job role tailored modules.

This is a fully bespoke module and the content will vary in line with individual requirements. The topics may include:

- Advanced navigation and record management
- Creating advanced search queries
- Creating and managing a product catalogue & product hierarchies
- Configuring process flows for CRM entities including stage gating
- Building and managing CRM automated workflows
- Creating & editing CRM reports
- How to create advanced dashboards
- Customizing CRM document templates
- Applying CRM goal management
- Working with parent : child record hierarchies
Microsoft Dynamics CRM
Database Administrator Training

Tuition for database administrators to manage and customise Dynamics CRM.

These sessions are designed to help administrators recognise opportunities for extending CRM and share best practice advice to maintain your database.

All delegates attending this course should be proficient users and familiar with the core CRM processes.

The topics covered during this bespoke modules can include:

- Creating user security profiles and managing teams
- Planning customisations for a Microsoft CRM implementation
- Customising the Dynamics CRM user interface and editing form components including field types
- Email management for CRM
- Creating relationship entities
- Applying data quality controls
- Configuring Business Rules
- Customising the CRM navigation pane
- Importing and exporting CRM data
- Configuring advanced CRM automated processes
- Defining CRM process flows including business rules and branching logic
Microsoft Dynamics CRM

CRM Train the Trainer Tuition

In our bespoke train the trainer sessions we provide tuition enabling internal trainers to acquire new CRM skills and communicate this information to their colleagues.

We'll share as much information as you can absorb so you can master and distribute the essential learning points.

Microsoft Dynamics CRM

Bespoke CRM Training

Our bespoke Microsoft Dynamics CRM courses are precisely tailored to your training needs and processes.

Prior to the day we'll contact you by phone to carry out a pre-training consultation to ensure we have a clear understanding of your objectives.

We can also carry out an on-site pre-training consultancy to discuss and design your internal CRM training courses. This will include advising on best practices and providing insight based on our years of training experience.

A bespoke training session can combine selected content across multiple suggested courses shown in this guide, or focusing on a small section of topics.

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CRM Training Recommendations

Like any application, success with Microsoft Dynamics CRM is dependant on how well people use it.

To help you maximise the value of your training we've detailed a series of recommendations to start your preparation.

**Define your success criteria & set expectations**

Before the session confirm your training aims and share them with your team to gain shared commitment to achieve them.

Consider incentives that’ll increase the motivation of your team to put these learning points into action, e.g. base rewards on CRM metrics.

**Confirm the skill gap**

For new CRM implementations most people will be at the same skill level but for a mature project carry out a competency audit to identify priorities and assess the skill gap.

If you have a mix of competency levels consider splitting training into separate modules. This could involve different groups in morning and afternoon sessions, or tuition spread over several days.

For individuals with very specific requirements one-to-one tuition may prove the best format.
Training Environment

Tuition will never be effective if users are distracted by emails, phone calls and office chatter.

It sounds obvious but many still attempt to arrange training at their workspace and are disappointed with the results. For a more conducive training environment schedule a room away competing distractions.

Check the IT

If you’re using a meeting room for training or scheduling the course at a different site, check to make sure everyone will have a reliable web connection and access to any other IT resources that’ll be needed.

Allowing delegates to follow tutor led examples on their own computer will always be more effective compared to watching a demonstration or sharing laptops.

Each person attending should have access to your CRM database so they can immediately test and apply all the learning points covered.

Limit Group Sizes

We recommend each training group should not exceed 6 people. With larger groups there is high risk that user questions and chat will slow pace of the day restricting the depth of content that can be covered.
Confirm the key processes

Database design and workflow planning should be discussed, implemented and tested before your training or your sessions risk descending into a chaotic ‘free for all’.

Your CRM plan should already have these processes defined and implemented prior to training but with users present new ideas will be aired.

This can prove a double-edged sword. You need to gain user acceptance but you also need to guard against the project being blown off course or hijacked by ideas that don’t consider wider requirements and will dilute the effectiveness of Dynamics CRM.

It’s a good idea to have a whiteboard or similar display that can act as a ‘car park’ for new ideas and questions that crop up but aren’t directly related to the immediate training session.

If people know you’ll follow up their points away from the session they’ll be more happy to move on provided they understand their ideas will be reviewed.

Our CRM trainers are an invaluable impartial resource in this situation.

They work with CRM projects every day and have plenty of experience to understand what processes work and what don’t. Use their insight to crystallize your process detail and decide if user suggestions are justified or stand firm and gain group commitment to the plan.
Secure CRM User Adoption with Management Support

Some users may use training as a forum to push back on anything that impacts on their role and build resistance against change.

Pre-empt this by having the session opened by a senior project sponsor to reinforce executive commitment to CRM. A good way of demonstrating this is to stress that key performance indicators will only be based on CRM data.

Training Takeaways

Create a tips sheet, send an email or even pin up step-by-step instructions so learning points have lasting visibility beyond the training session.

Preact can help you prepare follow up material to ensure key learning points are reinforced after the day.

CRM Training Review

Maintain the momentum that will be created following your training by reviewing progress.

Immediately after your training schedule a meeting a few weeks later to get users together to share experiences, review progress, suggest new ideas and if necessary take corrective action.