Microsoft Dynamics 365
Training Courses

Gold Cloud Customer Relationship Management
Gold Cloud Business Applications
Gold ISV

preact.co.uk
Tel: 0800 381 1000 or +44(0)1628 661810
If you are new to Microsoft Dynamics 365, or you want to develop your skills, we offer flexible training solutions to match your requirements.

In this guide you’ll find examples of suggested courses and recommendations to help you get the most from your training.

Preact have been training CRM users since 1993 and as Microsoft Gold Partner you can be sure of working with a leading partner.

Schedule training on-site at your premises, from our office in Maidenhead, or book an online session. Each course is bespoke to your business processes and training needs. We’ll share insight, answer your questions and show you how to maximise the benefits of Microsoft Dynamics 365.

We are committed to ensuring that your CRM aims are fully achieved. As part of our preparation the consultant who will deliver your training will phone you prior to the session. In this call we’ll agree a course structure and confirm training objectives that will help us accelerate the skills transfer.

With options for tuition on a group or one-to-one basis, role specific courses or train-the-trainer sessions, you can schedule personalised training at time that is convenient to you. Call us on 0800 381 1000 to discuss your training requirements and request a quotation.

PS: Did you know you can schedule training using our Managed Service for Dynamics 365? Plus, you can access complimentary training when you subscribe to our Premium Managed Service!

Ian Mennie
Professional Services Director
Microsoft Dynamics 365

Introduction Training

An introduction to Dynamics 365 empowers new users to quickly master the product’s main processes and interface.

Our introductory tuition is typically delivered in a half day session with a further half day focused on sales or service user content (see pages 4 & 5). Suggested introduction content will cover:

- Navigating Microsoft Dynamics 365
- Introducing the Dynamics 365 sales or service module
- Working with Dynamics in Outlook
- Personalising views and settings
- How to search and find Microsoft Dynamics 365 data
- The relationship between account, contact and lead records
- Record ownership and sharing access
- Creating and managing records
- Assigning records and important considerations
- Scheduling activities
- Working with Dynamics dashboards, reports and charts
- Using Dynamics 365 Help and Resource Centre
Microsoft Dynamics 365
Sales User Training

Tuition covering the sales management capabilities of Dynamics 365.

This course will show you how your sales processes can be managed using Dynamics 365, and how these can be improved to shorten sales cycles and reduce sales administration.

For new Dynamics 365 users, this tuition will often be combined in a one day course combining introductory topics shown on page 3.

Suggested topics include:

- Working with the main record types used in sales management
- Progressing leads and opportunities using guided process flows
- Understand qualification and disqualification of leads and opportunities
- Personalising list sales views
- Creating sales quotes and orders
- Working with quote templates
- Using custom charts and dashboards to analyse performance
- Automating processing using Dynamics 365 sales workflows
Microsoft Dynamics 365
Service Management Training

Understand how to use Dynamics 365 to improve service delivery and increase client retention.

We’ll focus on the case management module and how these functions are used to track and efficiently resolve client issues.

For new Dynamics 365 users, this tuition will often be combined in a one day course combining introductory topics shown on page 3. Broader topics can include process automation and working with Dynamics 365 integrated web portals.

Service topics can include:

- Creating customer service cases
- How to progress service cases using guided process flows
- Managing cases in personalised list views
- Using the Customer Service Hub
- Customising service dashboards and charts
- Understanding case queues and automating case routing
- Configuring automated service emails
- Working with the Entitlements entity to define support levels
- Applying Service Level Agreements and case escalation processes
- Using Dynamics 365 to manage contracts and renewals
- Managing knowledge records
- Working with the Dynamics 365 integrated self-service web portal
Microsoft Dynamics 365
Marketing User Training

In this course you'll receive tuition to help you benefit from the campaign management and lead generation capabilities of D365.

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

Course topics can include:

- Introducing the main marketing campaign functions
- How to build and manage static and dynamic lists
- Creating and executing new marketing campaigns
- Using Quick Campaigns
- Developing campaign templates
- Importing leads
- Capturing campaign responses
- Assigning campaign activities
- Using charts and dashboards to measure and report performance
- Creating surveys using the Voice of the Customer solution
- Working with Microsoft Social Engagement

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ClickDimensions Introductory Training

In this one day course you’ll gain a clear understanding to get started with ClickDimensions marketing automation.

We’ll introduce the main ClickDimensions capabilities and how to use these entities within the Dynamics 365 user interface.

Course topics will be adapted to fit your marketing processes and training needs. This will include:

- Creating email templates using the drag & drop editor
- Testing and scheduling emails
- Analysing campaigns
- Using email events to report open, click and bounce data
- Creating email marketing dashboards
- Working with landing pages
- Creating ClickDimensions surveys
- Introduction to ClickDimensions forms
- Using campaign automation for lead nurturing
- Best practices for managing ClickDimensions data
- Using ClickDimension web tracking
- Overview of ClickDimensions security roles

Delegates should already be familiar navigating Dynamics 365 and its contact and marketing list entities before scheduling this course.

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ClickDimensions Advanced Training

Maximise the value of ClickDimensions by understanding its wider functions and gain insight that will help you develop this solution.

As a fully bespoke course the content will be adapted to fit your requirements. Topics can include:

- Personalising email messages with dynamic content
- ClickDimensions security roles
- Applying email events to Dynamics 365 workflows
- Working with ClickDimensions forms including automated actions
- Creating surveys
- Customising lead scoring
- Managing subscriptions
- Social scheduling
- Web intelligence
- Advanced campaign automation
- Managing ClickDimensions in Dynamics 365

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Database Administrator Training

Tuition for database administrators on how to manage and customise Microsoft Dynamics 365.

These sessions are designed to help admins recognise opportunities for extending Dynamics and sharing best practice advice to help you maintain your database. The topics covered can include:

- Creating user security profiles and managing teams
- Planning customisations for a Dynamics 365 implementation
- Customising the user interface and editing form components including field types
- Email management
- Creating relationship entities
- Applying data quality controls
- Configuring Business Rules
- Customising the record forms
- Importing and exporting data
- Configuring advanced automated processes
- Advanced guided process flows including branching logic
- Working with parent : child record hierarchies including cascading rules

Delegates should be proficient users and be familiar with the core Dynamics 365 processes prior to attending this course.
Microsoft Dynamics 365

Bespoke Training

Bespoke tuition that is precisely tailored to your training needs and business processes.

Prior to the day we will 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 training courses. This will include advising on best practices and providing insight based on our years of training and consulting experience.

A bespoke training session can combine selected topics across multiple suggested courses shown in this guide, or focusing on specialist areas including Power BI.

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How To Prepare For Dynamics 365 Training

Ensure Microsoft Dynamics 365 user logins are in place for each training delegate.

Ensure everyone has a laptop to follow tutor-led worked examples and a good WiFi connection.

Book a room with a projector or large screen. Ask everyone to refrain from accessing phones and email. These can be checked during regular breaks.

If possible, have an internal project manager in the room who can answer any business-related questions.

Work with Preact to prepare relevant worked examples, e.g., recreate a recent opportunity.

We'll plan topics to be covered in time periods lasting no more than 90 minutes.

We'll confirm action-based training objectives that will be shown on PowerPoint or a checklist.

For new Dynamics 365 users, aim to structure training with a morning covering the basics before an afternoon session on their specific business processes.

Stress that the day is not for making changes or running fixes. If something unexpected is found this can be parked but the training has to continue.
Training Recommendations

Like any application, success with Microsoft Dynamics 365 is dependant on how well people use it. To help you maximise the value of your training we’ve outlined a series of recommendations to start your preparation.

Define your success criteria & set expectations

Before the session confirm your training aims and share these with your team to gain shared commitment to achieve them. Consider incentives that will increase the motivation of your team to put these learning points into action, e.g. base rewards on Dynamics 365 metrics.

Confirm the skill gap

For new implementations most people will be at the same skill level but for an existing project carry out a competency audit to identify priorities and assess the skills 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. To ensure a productive training experience schedule a room away competing distractions.

Check the IT

If you are using a conference room for training or scheduling the course at another venue, check to make sure everyone will have a reliable WiFi connection and access to any other IT resources that will be needed.

Allowing delegates to individually follow tutor led examples on their own computer will always be more effective compared to watching a demonstration or sharing laptops. Everyone attending should have access to your Dynamics 365 system that will enable them to immediately apply learning points.

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

The architecture of your Dynamics 365 database including how it will handle your processes should be implemented and tested prior to introductory 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 user engagement and commitment but you also need to guard against the project being blown off course or hijacked by ideas that don’t consider wider requirements.

It will be 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 will follow up their points away from the session they’ll be more happy to move on if they understand their ideas will be reviewed.

By having a project manager in the room during training means that business related questions can be answered with authority and greater context can be provided about each business process.

Our Dynamics trainers are an invaluable impartial resource in this situation. They work with projects every day and can draw on these experiences 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 commitment to the plan.

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Secure User Adoption with Management Support

Some individuals might 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. A good way of demonstrating this is to stress that key performance indicators will only be measured using Dynamics 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.

Training Review

Maintain the momentum that will be created following training by reviewing progress. Schedule a meeting a few weeks after your initial training to get users together again to share experiences, review progress, suggest new ideas and if necessary take corrective action.

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