



MICROSOFT TRAINING

Microsoft Dynamics 365 Sales Optimization Technical Workshop

Optimize Microsoft Dynamics 365 Sales processes in this technical workshop. Boost CRM efficiency and drive sales performance for your business.

DURATION

8 Hours

LEVEL

Intermediate

FORMAT

Instructor-Led

- Globally Recognized Certification

- Expert-Led Hands-On Training

- Flexible Scheduling

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COURSE OVERVIEW

The Microsoft Dynamics 365 Sales Optimization Technical Workshop is an intensive, intermediate-level program designed for IT professionals, system administrators, and technical sales support staff seeking to unlock the full potential of Dynamics 365 Sales. This workshop delves deep into the technical configurations, customization capabilities, and integration strategies required to fine-tune sales processes, enhance data integrity, and drive superior sales performance within an organization. Participants will gain hands-on expertise with core Dynamics 365 Sales modules, Power Platform components like Power Automate and Power Apps, and data analytics tools, empowering them to transform raw data into actionable sales intelligence.

Through practical exercises and real-world scenarios, attendees will learn to implement advanced features such as sales playbooks, goal management, lead scoring models, and robust reporting dashboards. The course emphasizes best practices for optimizing system performance, ensuring data quality, and securing sales data, enabling administrators to build a resilient and highly efficient sales ecosystem. This technical mastery translates directly into significant professional benefits, including the ability to streamline sales cycles, improve forecasting accuracy, boost team productivity, and ultimately contribute to a measurable increase in revenue for their organizations. Professionals will emerge equipped to lead technical initiatives that directly impact sales effectiveness and strategic growth.

Duration	8 Hours
Level	Intermediate
Vendor	Microsoft

COURSE CURRICULUM

01 Module 1: Foundations of Dynamics 365 Sales Architecture & Configuration

- Overview of Dynamics 365 Sales Hub and Core Entities (Lead, Opportunity, Account, Contact, Quote, Order)
- Understanding Business Process Flows and their technical implementation
- Security Roles and Team Management for Sales Users
- Customizing Forms, Views, and Charts for Sales Workflows

02 Module 2: Enhancing Sales Processes with Customization & Automation

- Implementing Business Rules and JavaScript for form logic
- Automating Sales Tasks using Power Automate (Flows) with Dynamics 365 triggers/actions
- Creating Custom Entities and Relationships for specific sales needs
- Leveraging Calculated and Rollup Fields for key sales metrics

03 Module 3: Data Management, Reporting & Analytics for Sales Performance

- Strategies for Data Import, Export, and Duplication Detection
- Building Advanced Find Queries for targeted sales data extraction
- Designing Sales-focused Dashboards and Reports (System & Personal)
- Integrating Power BI for advanced sales analytics and visualizations

04 Module 4: Advanced Sales Tools and Integration Strategies

- Configuring Sales Playbooks and Competitor Tracking
- Implementing Goal Management and Territory Management
- Integrating Dynamics 365 Sales with Outlook, Teams, and LinkedIn Sales Navigator
- Extending Sales Capabilities with AppSource solutions and custom development considerations

Module 5: Performance, Maintenance & Troubleshooting for Sales Environments

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- Monitoring System Performance and identifying bottlenecks
 - Troubleshooting common sales process issues and data discrepancies
 - Backup and Restoration strategies for Dynamics 365 Sales environments
 - Deployment best practices and environment management (Dev, Test, Prod)

CAREER PATHWAYS

Graduates of this program are prepared for the following roles:

- > **Dynamics 365 Sales Administrator**
- > **Sales Operations Specialist (CRM Technical Focus)**
- > **CRM Solutions Consultant specializing in Sales Enablement**

FREQUENTLY ASKED QUESTIONS

Q: What technical background is recommended for this workshop?

This technical workshop is ideal for IT professionals, system administrators, and developers who have a foundational understanding of CRM concepts and ideally some prior exposure to Microsoft Dynamics 365 or Power Platform.

Familiarity with basic database concepts and business process automation logic will be highly beneficial for maximizing your learning experience.

Q: How will this workshop specifically help me improve my organization's sales processes?

You will gain hands-on skills in configuring and customizing Dynamics 365 Sales to align with your organization's unique sales methodologies. This includes designing efficient business process flows, automating lead qualification, streamlining opportunity management, and building insightful dashboards that provide real-time visibility into sales performance, directly contributing to more optimized and productive sales cycles and ultimately, increased revenue.

Q: What is the difference between this workshop and standard Dynamics 365 Sales end-user training?

This technical workshop goes far beyond end-user functionality. While end-user training focuses on how to use the system, this workshop teaches you how to configure, customize, and optimize the system from an administrative and technical perspective. You will learn to implement changes, troubleshoot issues, integrate with other systems, and ensure the platform supports sales teams at a strategic and operational level, rather than just basic data entry and navigation.

ABOUT COMPUTER PRIDE



East Africa's Premier IT Training Center

With over 15 years of excellence, Computer Pride delivers globally recognized certification programs from leading technology vendors. Located on Kenyatta Avenue in Nairobi's CBD, our state-of-the-art facilities and expert instructors have empowered thousands of professionals across East Africa.

15+

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READY TO ENROL?

Take the next step in your technology career.

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