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Learning Style: Virtual Classroom

Technology: Microsoft

Difficulty: Beginner

Course Duration: 3 Days

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

About This Course:

This course teaches learners how to design, configure, and govern AI-enhanced sales solutions using Dynamics 365 Sales, Microsoft Copilot, and AI agents. Learners develop AI-first sales workflows that support the lead-to-cash process, helping sellers improve productivity, forecasting accuracy, decision-making, and overall sales performance.

Course Objectives:

By completing this course, learners will be able to:

- Configure Dynamics 365 Sales for AI-powered selling.
- Use Microsoft Copilot to improve seller productivity.
- Leverage AI agents throughout the sales process.
- Generate and qualify leads using AI.
- Manage and prioritize opportunities more effectively.
- Use AI capabilities to support sales forecasting and decision-making.
- Apply AI to sales execution and deal management.
- Extend Dynamics 365 Sales using AI and Power Platform tools.
- Design AI-first seller workflows aligned with business requirements.
- Apply governance and responsible AI practices to sales solutions

Audience:

- The course is intended primarily for Business Analysts and Functional Consultants who want to build AI-enhanced sales solutions with Dynamics 365 Sales, Microsoft Copilot, and AI agents. It is particularly relevant for professionals working with sales processes, CRM solutions, lead management, opportunity management, forecasting, and seller productivity.

Prerequisites:

- Basic understanding of CRM systems and familiarity with sales processes are recommended. No formal prerequisites are required.

Course Outline:

- **Configure Dynamics 365 Sales for AI-Powered Selling**
    - AI capabilities in Dynamics 365
    - Microsoft Copilot
    - AI agents
    - Dynamics 365 AI Hub

    - Configuring Dynamics 365 Sales
- **Generate and Qualify Leads Using AI**
    - AI-assisted lead generation
    - Lead qualification
    - AI-powered insights
    - Improving seller productivity
- **Win Deals with AI-Powered Sales Execution**
    - Opportunity management
    - AI-assisted sales execution
    - Customer and relationship insights
    - Forecasting and decision support
- **Extend Dynamics 365 Sales with AI and Power Platform**
    - Extending sales solutions
    - AI and Power Platform capabilities
    - Automation
    - AI agents and intelligent workflows