

# Microsoft Dynamics 365 for Customer Engagement (CRM)

## COURSE OVERVIEW

Microsoft Dynamics 365 for Customer Engagement (CRM) is a comprehensive collection of applications designed to help organizations manage and enhance all aspects of customer relationships. This course offers an introduction to the customer engagement capabilities of Dynamics 365. It blends theoretical insights with practical and real-world demos to empower users to leverage Dynamics 365 for enhancing customer interactions and driving business success. The curriculum further prepares participants to maximize the benefits of Dynamics 365 CRM to enhance customer satisfaction and business performance. Participants will explore core modules, including marketing, sales, customer service, and field service, learning to manage customer relationships, create campaigns, track sales pipelines, resolve cases, and optimize field operations.

## WHO SHOULD ATTEND?

This course is ideal for sales professionals, marketers, customer service agents, business analysts, CRM administrators, and IT specialists seeking to optimize customer engagement processes using Microsoft Dynamics 365 Customer Engagement apps.

## COURSE OUTCOMES

Delegates will gain the skills and knowledge to:

- Describe key components and features of Dynamics 365 Customer Engagement apps.
- Utilize Dynamics 365 Customer Insights for data-driven marketing and segmentation.
- Manage leads, opportunities, and sales processes effectively.
- Handle customer service cases efficiently with omnichannel support tools.
- Schedule and manage field service work orders and inspections.
- Integrate Dynamics 365 with Microsoft Teams for collaborative workflows.

## KEY COURSE HIGHLIGHTS

At the end of the course, you will understand;

- Dynamics 365 Customer Engagement app foundations and navigation.
- Customer and activity management with hands-on labs.
- Marketing campaign creation and customer journey management.
- Sales automation and business process flows.
- Case management and use of omnichannel customer service.
- Field service scheduling and mobile app functionalities.
- Practical demonstrations and scenario-based exercises.
- Microsoft Teams integration for enhanced productivity.

All our courses are dual-certificate courses. At the end of the training, the delegates will receive two certificates.

1. A GTC end-of-course certificate
2. Continuing Professional Development (CPD) Certificate of completion with earned credits awarded