




If you are new to Microsoft Dynamics 365, or you want to do more with the product, Preact offers flexible training solutions to match your requirements.

Preact have been training CRM users since 1993, and as a Microsoft Gold Partner and an Inner Circle member for Microsoft Business Applications, you can be sure of working with a trusted provider. With options for tuition on a group or one-to-one basis, role specific courses or train-the-trainer sessions, schedule personalised training at time that is convenient to you. Or, access Dynamics 365 training content on-demand using our eLearning Academy.

<p>Group training sessions</p> 	<p>1-to-1 training sessions</p> 	<p>eLearning Academy</p> 
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In this guide you'll find examples of suggested user courses and recommendations to help you get the most from your training. As the world changes, and the needs of our clients too - we have adapted our approach to providing training. So whilst we are not currently offering in-person tuition, which we will look to resume when it is safe to do so, our trainers have more than enough experience providing successful remote based training.

Each tutor-led course is bespoke to reflect your business processes and training needs. We'll share insight, answer your questions and show you how to maximise the benefits of Dynamics 365. We are committed to ensuring that your aims are fully achieved. As part of our preparations the consultant who will deliver your training will agree a course structure and confirm your objectives in advance of the session that will help us accelerate the skills transfer.

To offer further flexibility and support continuous learning, Preact also offers on-demand tuition through our eLearning Academy. This cover a range of core Dynamics topics including department-based functions and administration processes. Allowing new users to easily schedule learning into their inductions and existing users to increase their Dynamics 365 knowledge and fill in gaps.

Microsoft Dynamics 365 Training Guide

Contents

Course Examples	
Introduction Training	3
Sales User Training	4
Service Management User Training	5
Marketing User Training	6
ClickDimensions Starter Training	7
ClickDimensions Advanced Training	8
Introduction to Power BI	9
Database Administrator Training	10
Bespoke Training	11
How To Prepare For Dynamics 365 Training	12
Training Recommendations	13 - 15
Preact's eLearning Academy	16

Course Examples

Microsoft Dynamics 365

Introduction Training

An introduction to Dynamics 365 for Sales or Service applications empowers new users to quickly master the core functions and user 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

This course will provide tuition covering how your sales processes can be managed using Dynamics 365 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 the previous page.

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
- Marking an opportunity as won or lost
- Personalising sales list views
- Creating sales quotes and orders
- Working with quote templates
- Creating sales charts and dashboards to analyse performance
- Automating processing using Dynamics 365 sales workflows



Microsoft Dynamics 365

Service Management User 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.

Service topics can include:

- Creating customer service cases
- How to progress service cases using guided process flows
- Managing cases in personalised list views
- 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
- An introduction to the Dynamics 365 integrated self-service web portal

Broader topics can include process automation and working with Dynamics 365 integrated web portals.



Microsoft Dynamics 365

Marketing User Training

For Dynamics 365 Sales users this course will focus on benefits from the campaign management and lead generation capabilities.

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

For Dynamics 365 Marketing users the course helps users really tailor customer interactions.

Course topics can include:

- Creating customer emails
- Creating customer Journeys
- Working with customer segments



 ClickDimensions | Platinum Partner

Microsoft Dynamics 365

ClickDimensions Starter Training

In this one day course you'll gain a clear understanding on how 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 ClickDimensions 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



Microsoft Dynamics 365

 ClickDimensions | Platinum Partner

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 web forms including automated actions
- Creating surveys
- Customising lead scoring
- Managing subscriptions
- Web intelligence
- Advanced campaign automation
- Managing the ClickDimensions solution in Dynamics 365



Power BI

Introduction to Power BI

Understand the basics of using Power BI to transform data, build reports and discover new insights.

- What is Power BI
- Connecting to Data Sources: Dynamics CSV and Excel sheets

Data Manipulation

- Changing types, splitting data
- Dealing with Option Sets
- Adding new Columns
- Adding new Measures
- Creating relationships between data

Reports

- Creating Charts, Filters and Slicers

PowerBI.com

- Publishing to PowerBI.com
- Overview of app.powerbi.com
- Setting up a data refresh

Dashboards

- Pinning items to dashboards
- Sharing Power BI dashboards
- Embedding dashboards to CRM



Microsoft Dynamics 365

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 customisations in a non-production environment and moving customisations to a live environment
- Creating relationship entities
- Applying data quality controls
- Customising the record forms
- Importing and exporting data
- Configuring advanced automated processes
- Advanced guided process flows including branching logic
- Apply business logic rules to personalise forms and processes
- Working with parent/child record hierarchies including cascading rules
- Creating database backups

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. 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.

How To Prepare For Dynamics 365 Online Training

Before the training session

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

Send reminders to participants before the session and make sure their calendar invite includes a link to join the live session.

Where possible, we recommend everyone has two screens to test learning points without closing the meeting window.

Ensure everyone is familiar with the meeting app and has tested this - we use Microsoft Teams for our live sessions.

We recommend delegates use a headset where possible.

Encourage everyone to join 10-15 minutes early to test the sound is ok and resolve any glitches such as background noise or echoes.

Discuss relevant worked examples with our trainer before the session.

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

Make sure everyone is clear on the learning objectives - we recommend summarising these points in the meeting invite.

During the training session

If possible, have an internal project manager join the session who can answer any business related questions.

Stress that the day is not for making changes or running fixes. If something unexpected is found this can be parked, as the training must continue.

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

To minimise distractions, we recommend delegates switch off emails and set messaging apps to 'do not disturb'.

During Q&A sessions, participants are encouraged to use their webcam.

After the training session

A recording can be provided after the session if anyone encounters a connection issue.

Collect feedback immediately after the session and agree follow-up actions.

Training Recommendations

Consistent with any application, success with Microsoft Dynamics 365 is dependant on how well people use the product. 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 for achieving them. Consider incentives that will increase the motivation of your team to put these learning points into action, e.g. base rewards on metrics that reflect data in Dynamics 365.

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 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 background chatter. We recommend delegates switch off emails and set messaging apps to 'do not disturb'.

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.

Your CRM plan should already have these processes defined and implemented but new ideas are likely to be put forward during training. This can prove a double-edged sword. You need user engagement and commitment but you also need to guard against ideas that don't consider wider requirements.

It will be a good idea to have a 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 present 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.

Check the IT

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. Everyone attending should have access to your Dynamics 365 system that will enable them to immediately apply learning points.

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 and email out a tips sheet, or even 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

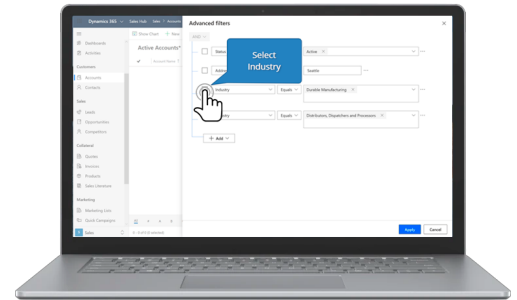
Maintain the momentum that will be created following training by reviewing progress. Schedule a meeting a few weeks after your initial training to get users together again to share experiences, review progress, suggest new ideas and if necessary take corrective action.

Preact's eLearning Academy

How To Access Modules

Preact managed service clients receive entitlement to access our eLearning Academy at **no additional cost**.

This automatically covers new learning modules that are released each month.



INCREASE KNOWLEDGE

Watch step-by-step breakdowns of Dynamics features to ensure proficiency

ACTIVE LEARNING

Test understanding by completing guided simulations to practice in a safe environment

SIMPLIFY ON-BOARDING

On-demand training helps new users quickly get started with Dynamics 365

CONSISTENCY

Ensure all team members receive the same up-to-date training

Learning Modules Include

Navigating Dynamics 365

Adding Accounts & Contacts

Creating & Progressing Sales Opportunities

Working with Security Roles

Working with Service Level Agreements

Logging Phone Calls

Using Dashboards & Charts

Working with Service Cases

Editing the User Interface

Using Outlook Integration

Contact Us

Get in contact now to schedule a training day for your team, a 1-to-1 session for yourself, or to activate your eLearning Academy account.

Whatever your training needs are, Preact will facilitate the next step you need to increase Dynamics 365 user knowledge and expertise.

Call us on 0800 381 1000 or visit our website to find out more!