

# **Dynamics 365 for Sales**

## **Event guide**



Please consider the information in this kit a framework, not a fully-packaged standalone event. Please use it to create your own Dynamics 365 event that is tightly aligned with this guidance, a Dynamics 365 event with your unique spin, or another event that is better aligned to serve you and your customers.



## Resources

## Hosting a Dynamics 365 for Sales event

Schedule Checklist

### **Event assets**

Abstract Agenda Registration page Feedback form

## Marketing assets

Invites Social Banner



## Hosting a Dynamics 365 for Sales event

Thank you for your interest in hosting a Microsoft Dynamics 365 for Sales event. Our objective with this event kit is to provide partners with a framework for hosting a Dynamics 365 for Sales event of your own.

This event kit will provide guidance on hosting a successful event and resources to help you pull it off, including a workback schedule, a to-do checklist, an event abstract and agenda, and assets to help you market your event.

### Making it your own

Please consider the information in this kit a framework. To the extent which it is useful, feel free to use it to create a Dynamics 365 for Sales event that is tightly aligned with this guidance, a Dynamics 365 for Sales event with your unique spin, or another event that is better aligned to serve you and your customers.

### **Topics to consider:**

- · Evaluating sales performance
- Digital transformation in sales
- Leveraging technology to build stronger relationships
- · Predictive sales tools
- Defining and creating your sales process

## Other resources Event guide

#### **Documents**

- Schedule + Checklist
- Event overview
  - Abstract
  - Agenda

#### Marketing

- · Invite emails
- Social posts
- Banners
  - Emails
  - Social
  - Registration/Feedback

The following are examples to provide guidance as you create your own events.

## Schedule + Checklist



### Pre-event

- -6 weeks
  - O Set date for event
  - O Secure venue
  - O Confirm speakers
  - O Set agenda
  - O Determine invite list
  - O Write event copy
- O Determine demand gen strategy

#### -5 weeks

- O Launch registration page
- O Send initial invites

#### -4 weeks

- O Contact catering
- O Order swag
- O Organize security
- O Schedule social posts

### -2 weeks

- O Lock slides
- O Provide catering info to venue
- O Send second invites

## -3 days

- O Provide guest list to venue
- O Send reminder emails
- O Launch post-event survey

## Day of event

- O Provide attendees with WiFi password
  - O Create hashtag and encourage attendees to share
  - O Take pictures during the event and share them on social

## Post-event

- +1 day
  - O Send follow-up emails with survey request

### Checklist

### **Event logistics**

- O Event date and time
- O Event venue
- O Invite list
- O Catering
  - O Consider dietary restrictions
- O Security

## **Programming**

- O Speakers
- O Agenda
- O Slide templates

### Marketing

- O Registration page
- O Feedback form
- O Social media posts
  - O Create hashtag
- O Emails
  - O Invite
  - O Second invite
  - O Registration confirmation
  - O Reminder
  - O Thank you
  - O Optional: Waitlisted, Rejected, Change location or schedule, Cancellation confirmation, Event cancellation, Sorry we missed you
- O Swag (Optional)
  - O Pens, stickers, power packs, USB sicks

### **Experience**

- O Name tags
- O Internet connectivity/WiFi
- O Signage (Optional)
  - O Welcome signs, posters



# Event assets Abstract Agenda

Abstract Agenda Registration page Feedback form

The following are examples to provide guidance as you create your own events.

## Abstract + Agenda



### **Abstract**

Go beyond sales force automation with Dynamics 365 for Sales to better understand customer needs, engage more effectively, and win more deals.

Strong customer relationships are incredibly important. As technology changes the nature of customer interactions—both in the way customers learn about products and through new communication channels—and as the speed of doing business increases, sellers may find it difficult to identify qualified leads and maintain relationships with all of their buyers.

We'd like to invite you and your team to participate in our Dynamics 365 for Sales Summit, designed to equip you and your sales team with the knowledge and tools to foster stronger relationships with your buyers, close more deals, and drive higher revenue.

During this event you will learn how to:

- **Inspire:** Get inspired by new ideas and success stories of modern sales teams leveraging technology to drive growth.
- **Discover:** Discover opportunities to improve sales performance, build better relationships, and create better experiences for your customers.
- **Experiment:** Try the latest tools from Dynamics 365 for Sales.

## **Agenda**

AM Event	PM Event	Schedule
08:00 AM	12:00 PM	Registration & Breakfast/Lunch
09:15 AM	01:15 PM	Welcome
09:30 AM	01:30 PM	Inspire session
10:30 AM	02:30 PM	<b>Discover</b> session
11:15 AM	03:15 PM	Break
11:30 AM	03:30 PM	Experiment session
12:45 PM	04:45 PM	Closing
01:00 PM	05:00 PM	Reception & Networking

## Registration page





Partner logo

# Dynamics 365 for Sales Summit

### Register today!

Go beyond sales force automation with Dynamics 365 for Sales to better understand customer needs, engage more effectively, and win more deals.

Strong customer relationships are incredibly important. As technology changes the nature of customer interactions—both in the way customers learn about products and through new communication channels—and as the speed of doing business increases, sellers may find it difficult to identify qualified leads and maintain relationships with all of their buyers.

We'd like to invite you and your team to participate in our Dynamics 365 for Sales Summit, designed to equip you and your sales team with the knowledge and tools to foster stronger relationships with your buyers, close more deals, and drive higher revenue.

During this event you will learn how to:

- **Inspire:** Get inspired by new ideas and success stories of modern sales teams leveraging technology to drive growth.
- Discover: Discover opportunities to improve sales performance, build better relationships, and create better experiences for your customers.
- Experiment: Try the latest tools from Microsoft Dynamics 365 for Sales.

## **Agenda**

PM Event	Schedule	
12:00 PM	Registration & Breakfast/Lunch	
01:15 PM	Welcome	
01:30 PM	Inspire session	
02:30 PM	Discover session	
03:15 PM	Break	
03:30 PM	Experiment session	
04:45 PM	Closing	
05:00 PM	Reception & Networking	

_		•				
Re	a	ı	ς	t	ρ	ľ
-	ч		_	•	·	

- 9		
Name		
Company		
, , , , , , , , , , , , , , , , , , ,		
Title		
Title		
Fmail		
-mail		

Submit

### **Details**

#### When

February 7, 2019 | 12:00 PM - 5:00 PM PST

#### Where

Microsoft Training Center 700 Bellevue Way NE Bellevue, WA 98004

## Feedback form



Partner logo	Dvna	mics 36	5 for S	ales Summ
		65 for Sales Summit. W	e invite you to co	mplete a brief survey to
How satisfied were	you with this event? * O Somewhat satisfied	O Somewhat dissatist	fied O Very dis	satisfied
	ld you agree that attending or oducts and/or services?  O Somewhat agree	*	ed you to either red	commend, try, purchase, or  O Strongly disagree
Did you achieve yo	our objectives for attending	ng this event? *		
<b>Did you find the D</b> O Highly valuable	ynamics 365 for Sales Sur O Valuable O Lo	mmit and content valuab ow value	ole?	
	the Dynamics 365 for Salo O Excite O Explore		most relevant? O None	
Which emerging to	echnologies are you most	interested in?		
As a result of attenorganization?  O Highly likely	ding the Dynamics 365 for O Likely O Not at a		ely are you to delive	er this content to your
Would you like us	to send you the Dynamic	s 365 for Sales Toolkit?		

Submit



Banners

The following are examples to provide guidance as you create your own events.



## **Emails**

### **Invitations**

- Invite
- · Second invite

#### **Auto responses**

- Registration confirmation
- Waitlisted
- Rejected
- · Event reminder

### Changes

- Change location or schedule
- Registration has been cancelled
- · Event cancelled

#### Follow-up

- Registered, did not attend
- Thank you for attending

## Invitations Invite

Subject line: Invitation to the Dynamics 365 for Sales Summit Dear [NAME],

We'd like to invite you and your team to participate in our Dynamics 365 for Sales Summit, designed to equip you and your sales team with the knowledge and tools to foster stronger relationships with your buyers, close more deals, and drive higher revenue. During the summit, we will explore new ideas, share success stories, discover new opportunities for your business to improve sales performance, and demo the latest tools from Dynamics 365 for Sales.

#### When

[DATE] [TIME]

#### Where

[ADDRESS]

This is an event you don't want to miss! We encourage you to register right away, as space is limited. Event details and registration information is here [LINK]. We hope to see you at the Dynamics 365 for Sales Summit!

Best Regards,

[NAME]

Unsubscribe | Privacy Statement [PARTNER NAME] [PARTNER ADDRESS]



## Invitations Second invite

Subject line: Registration Closing Soon: Dynamics 365 for Sales Summit Dear [NAME],

I hope thinks are going well for you.

We're just a couple weeks away from our Dynamics 365 for Sales Summit, and I wanted to give you a heads up that registration will be closing soon. If you're planning to attend, please register [LINK] today!

One last thing: A few customers have reached out wondering if there is a fee to attending this event. There is no fee and attendance is absolutely free.

When

[DATE]

[TIME]

Where

[ADDRESS]

Hope to see you at the Summit!

Best Regards,

[NAME]

Unsubscribe | Privacy Statement [PARTNER NAME] [PARTNER ADDRESS]



## Auto responses Registration confirmation

Subject line: Dynamics 365 for Sales Summit: Registration confirmation
Thank you for registering. This email confirms your registration for the following event:

Dynamics 365 for Sales Summit [ADDRESS]

[DATE] [TIME]

We look forward to seeing you at the event! If plans change and you are unable to attend, please use the link below to cancel your registration.

[Cancel my registration]

## Auto responses Waitlisted

Subject line: Dynamics 365 for Sales Summit: Registration pending
Thank you for your interest in attending our upcoming Dynamics 365 for Sales Summit. Due to the popularity of this event, your registration cannot be automatically confirmed. You will be notified by email if there is capacity for you to attend.

Dynamics 365 for Sales Summit [ADDRESS]

[DATE] [TIME]

Thank you again for your interest.



## Auto responses Rejected

Subject line: Dynamics 365 for Sales Summit

Thank you for your interest in attending the Dynamics 365 for Sales Summit. Unfortunately, due to the popularity of this event we are unable to accommodate your request to attend.

Dynamics 365 for Sales Summit [ADDRESS]

[DATE] [TIME]

We apologize for any inconvenience this may have caused and look forward to seeing you at future events. Please visit our website if you are interested in learning more about other events and webcasts.

## Auto responses Event reminder

Subject line: Dynamics 365 for Sales Summit: Reminder

Thank you for your interest in our Dynamics 365 for Sales Summit. We would like to remind you that you are registered for the following event:

Dynamics 365 for Sales Summit [ADDRESS]

[DATE] [TIME]

We look forward to seeing you at the event! If plans change and you are unable to attend, please use the link below to cancel your registration.

[Cancel my registration]



#### Changes

### **Change location or schedule**

Subject line: Dynamics 365 for Sales Summit: New location/New schedule

The Dynamics 365 for Sales for which you are registered has changed location and/or schedule. Please see the new event details below:

Dynamics 365 for Sales Summit [ADDRESS]

[DATE] [TIME]

We apologize for any inconvenience to you and your schedule. If you are unable to attend, please use the link below to cancel your registration.

[Cancel my registration]

### Changes

## Registration has been cancelled

Subject line: Dynamics 365 for Sales Summit: Cancellation confirmation This confirms your registration has been cancelled for the following event:

Dynamics 365 for Sales Summit [ADDRESS]

[DATE] [TIME]

We look forward to seeing you at an event in the future! Please visit our [website] if you are interested in learning more about other events and webcasts.



## Changes **Event cancelled**

Subject line: Dynamics 365 for Sales Summit cancelled We regret to inform you that our Dynamics 365 for Sales Summit has been cancelled.

Dynamics 365 for Sales Summit [ADDRESS]

[DATE] [TIME]

We apologize for any inconvenience. We will be sure to notify you if this event is re-scheduled for a later date. Please visit our [website] if you are interested in learning more about other events and webcasts.

## Follow-up Registered, did not attend

Subject line: Dynamics 365 for Sales Summit: Sorry we missed you

Our records indicate that you were registered for the following event but did not attend:

Dynamics 365 for Sales Summit [ADDRESS]

[DATE] [TIME]

Please visit our [website] if you are interested in learning more about other events and webcasts. We look forward to seeing you at one of our future events!



## Follow-up Thank you for attending

Subject line: Dynamics 365 for Sales Summit: Thank you for attending! Thank you for attending the following event:

Dynamics 365 for Sales Summit [ADDRESS]

[DATE] [TIME]

If you did not get a chance to provide feedback the day of the event, please let us know what you thought of everything via our [survey].

We hope that you found this event valuable and informative. Please visit our [website] if you are interested in learning more about other events and webcasts.

We look forward to seeing you again in the future!

## Social + Banners



#### **Twitter**

Did you know that on average, salespeople only spend a third of their day actually talking to prospects? Learn how to improve sales productivity and build better relationships with your customers at our Dynamics 365 for Sales Summit on [DATE]. Register today!

Register for our Dynamics 365 for Sales Summit, designed to equip you and your sales team with the knowledge and tools to foster stronger relationships with your buyers, close more deals, and drive higher revenue.

Get inspired and discover new opportunities to improve sales performance at our Dynamics 365 for Sales Summit on [DATE]. Space is limited.

Did you know that 55% of sales reps think their company's sales tools are an obstacle instead of a facilitator? Explore the latest sales tools from Microsoft and learn how to boost productivity and increase revenue at our Dynamics 365 for Sales Summit on [DATE]. Register [here].

Move beyond sales force automation with intelligent solutions that provide end-to-end, immerse experiences for opportunity management. Register for our Dynamics 365 for Sales Summit and learn how to transform your sales.

#### Facebook + LinkedIn

Title: Go beyond sales force automation with Dynamics 365 for Sales to better understand customer needs, engage more effectively, and win more deals.

We'd like to invite you and your team to participate in our Dynamics 365 for Sales Summit, designed to equip you and your sales team with the knowledge and tools to foster stronger relationships with your buyers, close more deals, and drive higher revenue.

During this event you will learn how to:

- Inspire: Get inspired by new ideas and success stories of modern sales teams leveraging technology to drive growth.
- Discover: Discover opportunities to improve sales performance, build better relationships, and create better experiences for your customers.
- Experiment: Try the latest tools from Microsoft Dynamics 365 for Sales.

Learn more and register at the link below.

#### Banner



### © 2018 Microsoft Corporation. All rights reserved.

This document is provided "as-is." The information and views expressed in this document, including URL and other Internet Web site references, are current as of the publication or revision date and may change without notice. You bear the risk of using it.

This document is provided for informational purposes only and cannot be incorporated within, or attached to, any type of an agreement. This document is not intended to be a service contract, and does not commit Microsoft, its channel partners, or the customer to any features, capabilities or responsibilities mentioned herein. As used in this document, references to "partner" refer solely to marketing relationships and do not refer to or imply a partnership or any other legal relationship.

The furnishing of this document does not provide you with any legal rights to any intellectual property in any Microsoft product or service. You may copy and use this document for your internal, reference purposes only.