

# 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

## 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

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

### -5 weeks

- ☐ Launch registration page
- ☐ Send initial invites

### -4 weeks

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

### -2 weeks

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

### -3 days

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

## Day of event

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

## Post-event

### +1 day

- ☐ Send follow-up emails with survey request

## Checklist

### Event logistics

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

### Programming

- ☐ Speakers
- ☐ Agenda
- ☐ Slide templates

### Marketing

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

### Experience

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



# Event assets

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 | <b>Inspire</b> session         |
| 10:30 AM | 02:30 PM | <b>Discover</b> session        |
| 11:15 AM | 03:15 PM | Break                          |
| 11:30 AM | 03:30 PM | <b>Experiment</b> 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 | <b>Inspire session</b>         |
| 02:30 PM | <b>Discover session</b>        |
| 03:15 PM | Break                          |
| 03:30 PM | <b>Experiment session</b>      |
| 04:45 PM | Closing                        |
| 05:00 PM | Reception & Networking         |

### Register

Name

Company

Title

Email

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



## Dynamics 365 for Sales Summit

**Thank you for attending our Dynamics 365 for Sales Summit. We invite you to complete a brief survey to provide feedback on your experience. As a note, this survey is not anonymous.**

How satisfied were you with this event? \*

☐ Very satisfied ☐ Somewhat satisfied ☐ Somewhat dissatisfied ☐ Very dissatisfied

How strongly would you agree that attending the event has motivated you to either recommend, try, purchase, or deploy Microsoft products and/or services? \*

☐ Strongly agree ☐ Somewhat agree ☐ Neutral ☐ Somewhat disagree ☐ Strongly disagree

Did you achieve your objectives for attending this event? \*

☐ Yes ☐ No

Did you find the Dynamics 365 for Sales Summit and content valuable?

☐ Highly valuable ☐ Valuable ☐ Low value

Which sections of the Dynamics 365 for Sales Summit did you find most relevant?

☐ All of them ☐ Excite ☐ Explore ☐ Experiment ☐ None

Which emerging technologies are you most interested in?

As a result of attending the Dynamics 365 for Sales Summit, how likely are you to deliver this content to your organization?

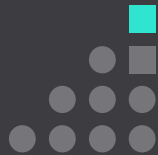
☐ Highly likely ☐ Likely ☐ Not at all

Would you like us to send you the Dynamics 365 for Sales Toolkit?

☐ Yes ☐ No

Would you like to share any other comments or feedback about the Dynamics 365 for Sales Summit?

Submit



# Marketing assets

Invites  
Social  
Banners

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



# Invites

## 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]



# Invites

## Invitations

### Second invite

*Subject line: Registration Closing Soon: Dynamics 365 for Sales Summit*

Dear [NAME],

I hope things 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]



# Invites

## 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.



# Invites

## 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]



# Invites

## 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.



# Invites

## 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!





# Invites

## 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.*

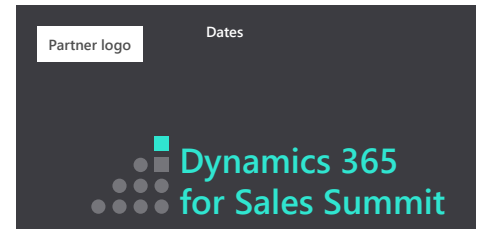
We'd like to invite you and your team to participate in our Dynamics 365 for Sales Summit, designed to equip you and your sales team with the knowledge and tools to foster stronger relationships with your buyers, close more deals, and drive higher revenue.

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.*