

What are Dynamics 365 Sales Playbooks?

In general, playbooks are a way that you can setup templated plans (a set of activities to follow) for following-up on specific situations that may arise regarding a Lead, Opportunity or other sales entity.

Some examples that come to mind:

- A new lead is generated on the website
- A key decision-maker departs while pursuing a large opportunity
- A top-tier customer requests a discount on a quote

What is playbook CRM?



Playbook **helps users to manage their marketing, sales and renewals (revenue generating teams) at user level, manager level and at CxO levels.** A CEO no longer needs to depend upon

on Excel sheets for managing overall reports etc. All teams and reports and data collection is now in a single app.

Introduction

With the Playbooks feature, we can automate the sales processes or events in the Dynamics 365 CE without knowing Dynamics 365 CE customizations like workflows, plugins, etc. Means, we can set up automated processes by simply creating records in the CRM.

So, here, let's take an example – if a new lead is created in CRM, the salesperson has to do two activities by default, following up the lead through Phone Call Activity and discussing with the Manager about lead. We can create/setup both the activities by a single click on lead record using the Playbooks feature.

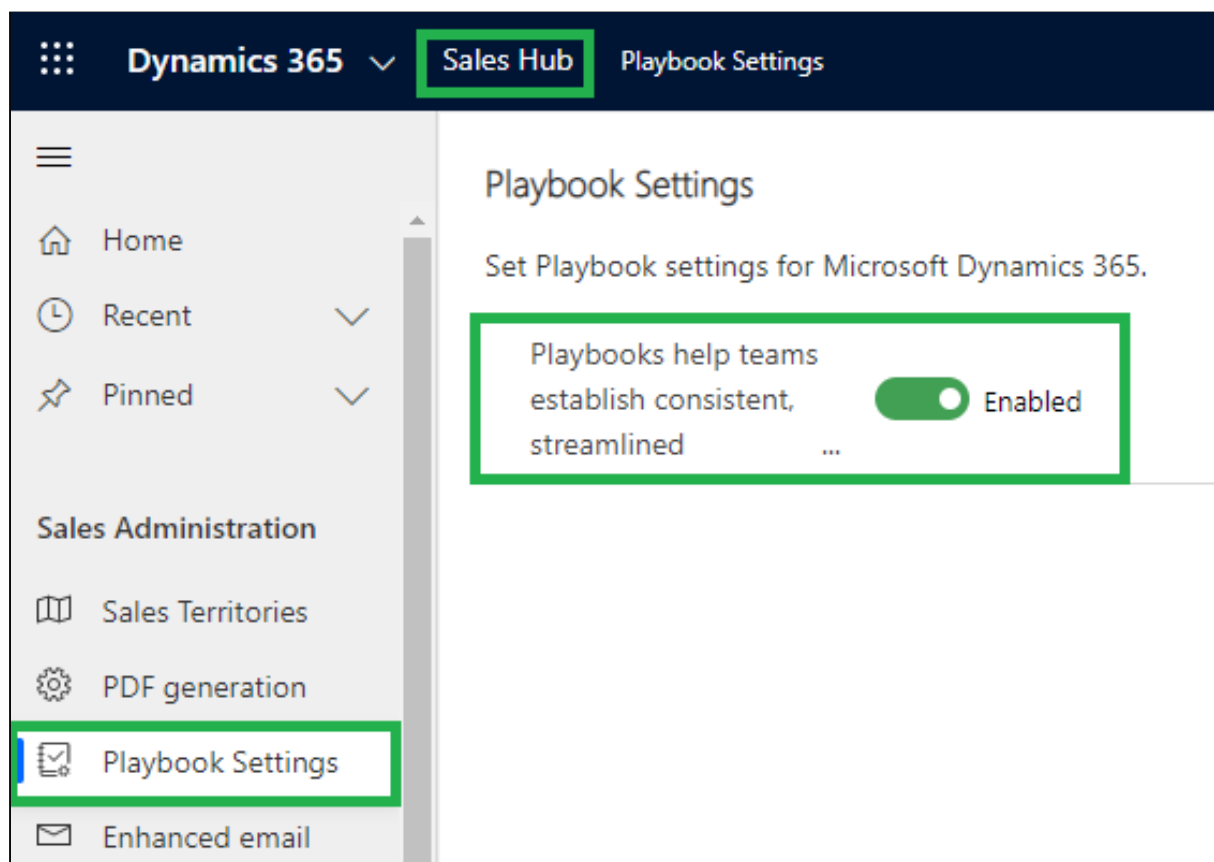
Playbooks will help in setting up specific events or activities to be done for every Sales record. This way salespeople can easily execute their events or activities with default set of rules. So, if a salesperson leaves the organization then the new salesperson can use the same events or activities followed by the previous salesperson.

Let's set up the Playbooks in CRM, you can refer the below steps:

Playbooks comes with following two security roles, so we need to assign these roles to users accordingly.

- **Playbook Manager:**Users can create Playbook templates that can be used against Sales entities like Lead, Opportunity, etc.
- **Playbook User:**Users can run the Playbook against the Sales Entities.

1. Enable the Playbooks from **Sales Hub->App Settings**



2. Now, create Playbook categories in the CRM, this category will let you know different kind of processes like one category for Lead process, another for Opportunity process, etc.

You can see Playbook Categories entity, in the same App Settings under the Playbook management.

The screenshot displays the Dynamics 365 interface for configuring Playbook categories. The top navigation bar shows the path: Dynamics 365 > Sales Hub > App Settings > Playbook categories > Lead Initial Process. On the left, a sidebar menu lists various settings, with 'Playbook categories' highlighted by a green box. The main content area shows the 'Lead Initial Process' configuration page. It includes a header with 'Lead Initial Process' and 'Playbook category'. Below this, there are tabs for 'General' and 'Related'. The 'General' tab is active, showing a form with two fields: 'Name' (required, marked with a red asterisk) and 'Description'. The 'Name' field contains the text 'Lead Initial Process', and the 'Description' field is empty.

Lead Initial Process	
Name	Lead Initial Process
Description	

3. Create Playbook templates which we can be used on Sales entities, where we can set up events or activities like defining the number of activities to be followed for each Sales entities.


We can also track the progress of Activities, as in how many activities are completed by the user. To enable this, we need to use “Track Progress” field on the Form.

Lead Initial Process

Playbook template



Summary Monitoring Related


Information



Category	*	 Lead Initial Process
Name	*	Lead Initial Process
Track progress	*	<input checked="" type="checkbox"/> Yes

To define the activities, we can use Activities grid on the 'Playbook Activities' Section, where we can define only Task, Phone Call and Appointment.

Playbook activities

 Add activity  ...

✓ Activity type	Subject
 No data available	

☒ Task
 Phone call
 Appointment

Here, you can see the FORM of the Task below, where you can see available fields to be used while creating actual activities in the CRM. So, when you fill the values in the fields, it automatically maps the field's data with actual activities. Similarly, we can go for Phone Call and Appointment forms.

Quick create: Playbook task

ⓘ Note: You can attach related documents to this activity after the saved, go to Edit Activity > Related > Documents to add documents.

Subject	* ---
Description	---
Relative due date (days)	---
Relative due time (hours)	10:00 AM
Duration	---
Priority	Normal

You can select for which entities this Playbook should work. For now, you can only select Contact, Account, Lead, Opportunity, Quote, Order and Invoice Entities.

Lead Initial Process

Playbook template

Summary

Monitoring

Related

Information

Category

*

Lead Initial Process

Name

*

Lead Initial Process

Track progress

*

Yes

Estimated duration (days)

Description

Playbook

✓ | As

Timeline

Enter a no

Select record types that this playbook applies to

Available

Account

Contact

Opportunity

Lead

Quote

Order

Invoice

>

>>

<<

<

Selected

Finally, Publish the Playbook templates as below:

[+ New](#)
[Delete](#)
[Refresh](#)
[Publish](#)
[Assign](#)
[Share](#)
[Email a Link](#)
[Flow](#)

Lead Initial Process

Playbook template

[Summary](#)
[Monitoring](#)
[Related](#)

Information

Category * [Lead Initial Process](#)

Name *

Track progress * ☒ Yes

Playbook activities

Activity type	Subject
Phone Call	Make Initial Call
Task	Report to manager

4. Now go to the Sales entities for which we have created the Playbook templates. For example, in my scenario I have used Lead so on Lead record I can Launch Playbook by using the Launch Playbook button.

Sales Hub Sales > Leads > Sam D'Souza

[+ New](#)
[Delete](#)
[Refresh](#)
[Qualify](#)
[Process](#)
[Disqualify](#)
[Launch playbook](#)

Sam D'Souza
 Lead · Lead ▾

Lead to Opportunity Sale... < **Qualify (7 Hrs)** **Develop**

[Summary](#)
[Details](#)
[Leads](#)
[Files](#)
[Related](#)

Contact

Topic * **Interested in Maplytics**

Type + **Item based**

First Name + **Sam**

Timeline

Enter a note...

- Phone Call from [REDACTED]** 13:40
 Make Initial Call
- Auto-post on Sam D'Souza** 13:08
 [REDACTED] created Sam D'Souza



Select the Playbook template which needs to be launched for the above Lead record:

Playbook templates

×

Select a playbook template you want to launch.

Search for records

<input checked="" type="checkbox"/>	Name	↓	Category	Track progress	Publisher	Created On
	Lead Initial Process		Lead Initial Process	Yes	 [redacted]	14-01-2020 12:...
	Initial Process Do not track		Lead Initial Process	No	 [redacted]	14-01-2020 13:...

ABC 1 - 2 of 2 (0 selected)

Launch

Once you click on Launch, the Playbook gets created against the Lead. You can see it from related tab of Lead form:

Sam D'Souza

Lead · Lead ▾

Lead to Opportunity Sale...

Active for 7 hours

<

Qualify (7 Hrs)

Summary

Details

Leads

Files

Related

Contact

Topic

Interested in Maplytics

Type

Item based

First Name

Sam

Last Name

D'Souza

Related - Marketing

Marketing Lists

Related - Common

Activities

Connections

Audit History

Documents

Playbooks

Here, you see one Playbook record is associated with Lead record below:

Sam D'Souza

Lead · Lead ▾

Lead to Opportunity Sale...

Active for 7 hours

Qualify (7 Hrs)

Develop

Propose

Summary

Details

Leads

Files

Playbooks

Related

Refresh

Run Report ▾

Excel Templates ▾

Export Playbooks ▾

Playbook Associated View ▾

✓ Name	↓ ▾ Owner	▾ Total activities	▾ Completed activi...	▾ Result	▾ Regarding
Lead Initial Process	🟢 [Redacted]	2	0	In Progress	Sam D'Souza

Open the Playbook record. Here, you can see the Activities which we have defined in the Playbook template that have been created against this Playbook.

Lead Initial Process

Playbook

Active Status

In Progress

Summary

Related

Playbook Information

Name	* Lead Initial Process
Total activities	2
Completed activities	0

Playbook activities

✓	Subject	Regarding	Activity ...	Activity ...
	Make Initial Call	Lead Initial Proce	Phone Call	Open
	Report to manager about in	Lead Initial Proce	Task	Open

So, you can use this Playbook for Activities to be done for this Lead.

Once you complete the activities, you can see the progress of all activities on the same Playbook record as we have enabled Track Progress.

Lead Initial Process

Playbook

Active Status

In Progress Result

Summary

Related

Playbook Information

Name	* Lead Initial Process
Total activities	2
Completed activities	<div>2</div>

Playbook activities

✓	Subject	Regarding	Activity ...	Activity ...
	Make Initial Call	Lead Initial Proce	Phone Call	Completed
	Report to manager about in	Lead Initial Proce	Task	Completed

And you can also complete the Playbook by updating its status as shown in below screen:



New



Delete



Refresh



Complete as



Lead Initial Process

Playbook

Summary

Related

Playbook Information

Name



Lead Initial Process



Successful



Not Successful



Partially Successful



Not Required

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