

Salesforce Understand and Drive Your Sale Implementation (BSX101)



Discover how to make implementation decisions with confidence by exploring foundational features and functionality of the Salesforce Platform. In this 5-day, heavily discussion-based instructor-led course, learn about standard and custom objects and applications, data management, data visualization, flow automation tools, and security mechanisms. Navigate the key phases and milestones of a Salesforce implementation, effectively communicate business needs, and provide directives to team members tasked with solution-building in order to help deliver robust Salesforce solutions that achieve business goals.

Who Should Attend

- This course is designed for individuals who are (or will soon be) supporting a Salesforce implementation in a decision-making capacity. This includes, but is not limited to, business analysts, IT managers, project managers, executive leaders, and executive sponsors. This course is not recommended for individuals tasked with solution-building.

Course Objectives

- Identify key stakeholders needed for a successful Salesforce implementation.
- Describe the Salesforce Data Model as it relates to Customer 360, Salesforce Clouds, and the Salesforce Platform.
- Identify security features used to control org and data access.
- Discuss which standard or custom objects and applications should be implemented based on specific business requirements and use cases.
- Recommend data migration techniques that preserve data quality.
- Understand Salesforce automation tools and how they solve for various business challenges.
- Analyze Salesforce data using reports and dashboards.
- Navigate the key phases and milestones of a Salesforce implementation.

Agenda

1. INTRODUCTION TO SALESFORCE IMPLEMENTATION CONCEPTS

2. SALESFORCE DATA MODEL

- Discover the Customer 360 Platform
- Examine Salesforce Clouds
- Navigate the Salesforce Platform
- Review the Salesforce Platform Data Model
- Understand Data Visualization

3. SECURITY AND ACCESS

- Create Users
- Access the Org
- Control Data

4. OBJECTS AND APPLICATIONS

- Review Standard Objects
- Understand Custom Objects
- Explore Standard Applications
- Discover Custom Applications

5. SALESFORCE CUSTOMIZATIONS

- Work with Fields
- Design Page Layouts
- Understand Record Types
- Review Dynamic Capabilities

6. SUCCESSFUL DATA MANAGEMENT

- Determine Data Strategy
- Create Data
- Ensure Data Quality

7. PROCESS AUTOMATION

- Streamline Business Processes with Automation Tools
- Learn Purpose-Driven Automation
- Automate with Flow

8. DATA ANALYSIS USING REPORTS s DASHBOARDS

- Organize Reports and Dashboards
- Build Reports
- Create Dashboards
- Define an Analytics Strategy

9. ADOPTION AND CONTINUED IMPROVEMENT

- Adopt your Implementation

- Adjust with Continuous Improvements