

Understand and Drive Your Salesforce Implementation

Cursusduur: 3 Dagen **Cursuscode: BSX-101** **Trainingsmethode: Virtual Learning**

Beschrijving:

Explore Salesforce features and functionality and gain the knowledge to make Salesforce implementation decisions with confidence. In this 3-day, heavily discussion-based class, learn about standard and custom objects and applications, data management, data visualization, flow automation tools, security mechanisms, and more. Successfully navigate the key phases and milestones of a Salesforce implementation, effectively communicate business needs, and provide directives to team members tasked with solution-building to deliver a robust Salesforce solution that achieves business goals.

Virtueel en Klassikaal™

Virtueel en Klassikaal™ is een eenvoudig leerconcept en biedt een flexibele oplossing voor het volgen van een klassikale training. Met Virtueel en Klassikaal™ kunt u zelf beslissen of u een klassikale training virtueel (vanuit huis of kantoor) of fysiek op locatie wilt volgen. De keuze is aan u! Cursisten die virtueel deelnemen aan de training ontvangen voor aanvang van de training alle benodigde informatie om de training te kunnen volgen.

Doelgroep:

This class 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 class is not recommended for individuals tasked with solution-building.

Doelstelling:

- 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.
 - Communicate the appropriate security measures needed to control org and data access.
 - Discuss which standard or custom objects and applications should be implemented based on specific requirements and use cases.
 - Effectively strategize how to migrate data into your Salesforce org while maintaining high data quality.
 - Understand Salesforce automation tools and how they solve for various business challenges.
 - Analyze Salesforce data with Reports and Dashboards.
 - Navigate the key phases and milestones of a Salesforce implementation.
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Cursusinhoud:

Introduction to Salesforce Implementation Concepts

Salesforce Data Model

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

Security and Access

- Create Users
- Access the Org
- Control Data

Objects and Applications

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

Salesforce Customizations

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

Successful Data Management

- Determine Data Strategy
- Create Data
- Ensure Data Quality

Process Automation

- Streamline Business Processes Using Automation Tools
- Learn Purpose-Driven Automation
- Automate With Flow

Data Analysis Using Reports ; Dashboards

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

Adoption and Continued Improvement

- Adopt Your Implementation
- Evaluate Continued Improvements

Nadere informatie:

Neem voor nadere informatie of boekingen contact op met onze Customer Service Desk 030 - 60 89 444

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