

Understand and Drive Your Salesforce Implementation

Duration: 3 Days **Course Code: BSX-101**

Overview:

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.

Target Audience:

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.

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.
- 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.

Content:

Introduction to Salesforce Implementation Concepts	Objects and Applications <ul style="list-style-type: none"> ■ Review Standard Objects ■ Understand Custom Objects ■ Explore Standard Applications ■ Discover Custom Applications 	Process Automation <ul style="list-style-type: none"> ■ Streamline Business Processes Using Automation Tools ■ Learn Purpose-Driven Automation ■ Automate With Flow
Salesforce Data Model <ul style="list-style-type: none"> ■ Discover the Customer 360 Platform ■ Examine Salesforce Clouds ■ Navigate the Salesforce Platform ■ Review the Salesforce Platform Data Model ■ Understand Data Visualization 	Salesforce Customizations <ul style="list-style-type: none"> ■ Work with Fields ■ Design Page Layouts ■ Understand Record Types ■ Review Dynamic Capabilities 	Data Analysis Using Reports ; Dashboards <ul style="list-style-type: none"> ■ Organize Reports and Dashboards ■ Build Reports ■ Create Dashboards ■ Create an Analytics Strategy
Security and Access <ul style="list-style-type: none"> ■ Create Users ■ Access the Org ■ Control Data 	Successful Data Management <ul style="list-style-type: none"> ■ Determine Data Strategy ■ Create Data ■ Ensure Data Quality 	Adoption and Continued Improvement <ul style="list-style-type: none"> ■ Adopt Your Implementation ■ Evaluate Continued Improvements

Further Information:

For More information, or to book your course, please call us on Head Office Tel.: +974 40316639

training@globalknowledge.qa

www.globalknowledge.com/en-qa/

Global Knowledge, Qatar Financial Center, Burj Doha, Level 21, P.O.Box 27110, West Bay, Doha, Qatar