

Understand and Drive Your Salesforce Implementation

Duration: 3 Days **Course Code: BSX-101** **Delivery Method: Virtual Classroom**

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.

Virtual Learning

This interactive training can be taken from any location, your office or home and is delivered by a trainer. This training does not have any delegates in the class with the instructor, since all delegates are virtually connected. Virtual delegates do not travel to this course, Global Knowledge will send you all the information needed before the start of the course and you can test the logins.

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.
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Content:

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

Further Information:

For More information, or to book your course, please call us on 00 966 92000 9278

training@globalknowledge.com.sa

www.globalknowledge.com/en-sa/

Global Knowledge - KSA, 393 Al-Uroubah Road, Al Worood, Riyadh 3140, Saudi Arabia