

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

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 Head Office 01189 123456 / Northern Office 0113 242 5931

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