UNDERSTAND AND DRIVE YOUR SALESFORCE IMPLEMENTATION (BSX101)

OVERVIEW

Discover how to make implementation decisions with confidence by exploring foundational features and functionality of the Salesforce Platform. In this 3-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 TAKE THIS COURSE?

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.

WHEN YOU COMPLETE THIS COURSE, YOU WILL BE ABLE TO:

- 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 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 with Reports and Dashboards.
- Navigate the key phases and milestones of a Salesforce implementation.

PREWORK

Please complete the following trailmix before attending our expert-led class: Trailmix, Trailhead Academy

IMPORTANT : If you use your personal computer and a configuration is described in the Computer Setup Guide, you must complete it before attending the class.

DURATION
3 days

DELIVERY FORMAT
- Classroom
- Virtual

LANGUAGE
Course in French /
Materials in English

USER INTERFACE
Lightning Experience

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LESSONS & TOPICS

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 & Access
- Create Users
- Access the Org
- Control Data

Objects & 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 & Continued Improvement
- Adopt Your Implementation
- Evaluate Continued Improvements

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