

Salesforce Essentials

Sales Department

FA-0542 · two-day

Mainframe & Enterprise Systems

Introduction

This two-day comprehensive training course is tailored to arm members of the sales team with the necessary knowledge and skills to leverage Salesforce effectively in their daily roles. The course will cover an introduction to the Salesforce environment, navigating the platform, managing leads, opportunities, and contacts, as well as creating custom reports and dashboards. Emphasis will be placed on practical application, including hands-on sessions and assessments, ensuring participants can confidently apply their newly-acquired skills within the Salesforce platform.

Learning outcomes

By the end of the course, participants will be able to:

- Navigate through the Salesforce platform with ease.
- Understand and work with Salesforce objects such as Leads, Contacts, Accounts, Opportunities, and more.
- Manage sales records effectively, including creation, update, and deletion.
- Use Salesforce's search and report functions for data retrieval and analysis.
- Create personalized reports and dashboards to track sales metrics.
- Understand Salesforce security in relation to data access and sharing.

Prerequisites

This course assumes that participants have:

- Basic computer skills.
- A fundamental understanding of sales processes and concepts.
- Familiarity with using web-based applications.

No prior Salesforce experience is required.

Training outline

1. Day 1

Introduction to Salesforce

- What is Salesforce?
- Salesforce for sales: Overview of Sales Cloud.
- Navigating Salesforce interface.
- Hands-on Practice: Navigating the Salesforce Interface

Managing Sales Data in Salesforce

- Understanding Salesforce Sales objects: Leads, Contacts, Accounts, Opportunities, and Products.
- Creating, editing, and managing records.
- Hands-on Practice: Managing Sales Records

2. Day 2

Searching and Reporting in Salesforce

- Using Salesforce Global Search.
- Introduction to Salesforce Reports and Dashboards.
- Creating and customizing Reports and Dashboards.
- Hands-on Practice: Creating and Customizing Sales Reports and Dashboards

Salesforce Security for Salespeople

- Understanding Profiles, Roles, Permission Sets.
- Managing record access and visibility.
- Hands-on Practice: Simulating Data Access and Sharing Scenarios

Final Assessment and Q&A

- Participants will be provided with a scenario to resolve using Salesforce, demonstrating their understanding and application of the skills acquired during the training.
- Open Q&A and course wrap-up.

Throughout the course, there will be ample opportunities for participants to ask questions and seek clarifications, fostering an engaging and collaborative learning experience.