Expert-Led Classes > Understand and Drive Your Salesforce Implementation

Understand and Drive Your Salesforce Implementation (BSX101)

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…

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Overview   Class Regist…

Job Role

Associate, Business Analyst, Consultant, Business User

Duration

In-Person: 3 Full Day(s)

Virtual: 3 Full Day(s) or 6 Half Day(s)

User Interface

Lightning Experience

Save as PDF

? Question, feedback or help

(https://trailhead.salesforce.com/help)

Learn the Foundations of AI

Trailhead Academy classes include a lesson where you'll learn AI concepts, responsible AI practices, and how to use AI and Salesforce together to drive productivity.

Overview

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.
- 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.

Prework

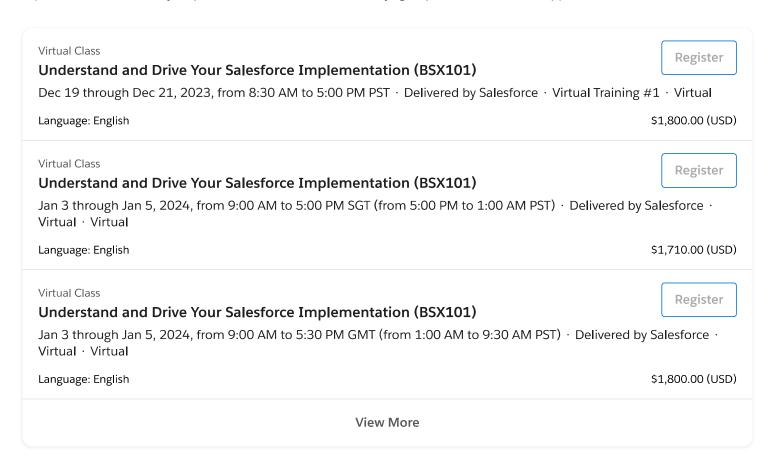Prepare for the course with this Trailmix.

Trailhead Academy
Understand and Drive your Salesforce Implementation (BSX101) Prework
Ensure you get the most out of BSX101 and complete this trailmix to prepare for the course!

Class Registration

Classes can only be purchased in a currency that your billing country supports. Use the Billing Country filter to see available classes. If your billing country/currency isn't available, contact us (https://trailhead.salesforce.com/help?topic=Trailhead_Academy&topicName=Trailhead%20Academy&groupName=Trailhead_Support).

Virtual Class

Understand and Drive Your Salesforce Implementation (BSX101)   Register

Dec 19 through Dec 21, 2023, from 8:30 AM to 5:00 PM PST · Delivered by Salesforce · Virtual Training #1 · Virtual

Language: English $1,800.00 (USD)

Virtual Class

Understand and Drive Your Salesforce Implementation (BSX101)   Register

Jan 3 through Jan 5, 2024, from 9:00 AM to 5:00 PM SGT (from 5:00 PM to 1:00 AM PST) · Delivered by Salesforce · Virtual · Virtual

Language: English $1,710.00 (USD)

Virtual Class

Understand and Drive Your Salesforce Implementation (BSX101)   Register

Jan 3 through Jan 5, 2024, from 9:00 AM to 5:30 PM GMT (from 1:00 AM to 9:30 AM PST) · Delivered by Salesforce · Virtual · Virtual

Language: English $1,800.00 (USD)

View More

Lessons and 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

Learn
Trails

Trailmixes

Modules

Projects

Trailhead Academy

Career Paths

Credentials
Superbadges

Certifications

Maintain Certifications

Verify Certifications

Take Free Certification Prep

Community
Trailblazer Community

Events

Quests

Be a Multiplier (BAM)

Salesforce Developers

Salesforce Admins

Trailblazer Connect

Extras
Sales Enablement

Customer Stories

Trail Tracker

Sample Gallery

Trailhead Store

Trailhead Help

English