



Implementation Essentials

(CON201)

Whether you're a new consultant who needs the skills and confidence to take on a new Salesforce implementation or an experienced consultant ready to take your knowledge to the next level, we offer the courses you need.

Implementation Essentials is the core training that enables your success with Salesforce. In this course, you'll learn best practices on how to implement the Sales and Service Clouds using process maps, important design considerations, key reporting metrics, and data management and migration strategies.

Who should take this course?

Implementation Essentials was designed by consultants, for consultants looking for an introduction to implementing the Sales and Service Clouds. This course is also useful for certified administrators and developers looking for implementation best practices and strategies.

Prerequisites

A solid understanding of Salesforce navigation and the Salesforce.com Certified Administrator credential.

What you will learn

When you complete this course, you'll be able to complete the following tasks for the Sales and Service Clouds:

- Ask targeted discovery questions to uncover business requirements
- Discuss each application's inherent business processes and features
- Describe design tradeoffs
- Design an application solution to address common business requirements
- Identify common key reporting metrics
- Explain common data migration and integration considerations
- Plan deployment strategies
- Recommend design considerations for usability and administration

Duration

Classroom – 3 days

Delivery Format

Classroom

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Course Outline: Implementation Essentials (CON201)

Topic	Objective
Implementing Salesforce Marketing	<p>For consultants seeking to learn marketing implementation concepts to:</p> <ul style="list-style-type: none"> • Drive new business • Align sales & marketing • Manage reports & campaigns to measure marketing ROI • Plan for data migration, integration, & advanced marketing concepts <p>Students will participate in exercises to learn how to:</p> <ul style="list-style-type: none"> • Plan for requirements gathering • Develop a lead-generation strategy • Design a lead handoff process • Design an effective campaign structure • Leverage campaigns to maximize marketing effectiveness
Implementing the Service Cloud	<p>For consultants seeking to learn implementation concepts for a customer service environment, including:</p> <ul style="list-style-type: none"> • High-quality “one and done” case management • Streamlined case resolution process • Increased agent effectiveness • Self-learning knowledge database • Reports to ensure service never skips a beat • Plan for data migration, integration, & advanced customer service concepts <p>Students will participate in exercises to learn how to:</p> <ul style="list-style-type: none"> • Plan for requirements gathering • Design a case routing process • Design a case management process • Design solutions to address usability • Design a knowledge management structure
Implementing the Sales Cloud	<p>For consultants seeking to learn SFA implementation concepts to:</p> <ul style="list-style-type: none"> • Build a strong pipeline • Manage the funnel • Improve sales rep productivity • Obtain full visibility with reports & dashboards • Extend the solution with advanced features, AppExchange applications, & other Salesforce CRM applications <p>Students will participate in exercises to learn how to:</p> <ul style="list-style-type: none"> • Plan a project kickoff • Generate a list of discovery questions for requirements gathering • Design a lead management process • Design a sales funnel • Design a custom SFA solution
Application Essentials	<p>Before setting up any application, consultants must learn to:</p> <ul style="list-style-type: none"> • Set up a secure environment • Optimize usability for client adoption • Set up data management practices to ensure trusted data quality • Provide full visibility with reports & dashboards • Understand the advanced concepts, applications, & customizations available to complement a CRM solution <p>Students will participate in exercises to learn how to:</p> <ul style="list-style-type: none"> • Modify existing security settings • Design home pages that minimize clicks to get to data • Create a data migration plan



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