

GETTING STARTED: SALES CLOUD:

Fast Start

Understand the core capabilities of Sales Cloud.

In just 2 hours, learn how to use Accounts, Contacts, Leads and Opportunities in Sales Cloud. Close deals faster and grow accounts by getting up and running quickly on Sales Cloud. A Specialist will walk through best practices for Sales Cloud and then show you how to setup and use Leads, Opportunities, Accounts, and Contacts.

What it can do for you.

- Reduce the time to get up and running with Sales Cloud
- Leverage existing functions to capture leads and opportunities

How It Works

A Certified Specialist will deliver this 1-on-1 virtual consultation via one 2-hour call.

Discovery

- Our Specialist will review with you your business and sales processes to uncover your use case

Delivery

- Review how Sales Cloud helps you build customer relationship.
- A walk through of the value and use of the core objects in Sales Cloud - Leads, Opportunities, Accounts and Contacts.
- Configure your sales stages in Salesforce.
- Learn how to use list views, page layouts, and custom fields to customize Salesforce Sales Cloud

Outcomes

This accelerator provides you with

- Fast Sales Cloud ramp up to get you up and running with out-of-the-box functionality
- Provides you the fundamentals of customizing salesforce for successful adoption

ADDITIONAL INFORMATION

Premier or Signature

Time you will spend on this Accelerator: 3 hours

GOAL

Achieve Faster ROI

INTENDED USER

You are new to Sales Cloud and need to quickly get started using core capabilities of Sales Cloud.

PREREQUISITES

- Must have Premier or Signature Success Plan
- Sales Cloud licenses
- A leader or executive who is engaged and committed to a successful outcome
- A Salesforce Admin to attend the workshop
- Willingness to complete a customer satisfaction survey at the conclusion of the Accelerator

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To schedule your 1-on-1 Accelerator, [visit our Help Portal](#), or contact your account executive or success team today!

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