

Salesforce for Business Professionals

COURSE OVERVIEW

Salesforce for Business Professionals is an introductory course that examines the fundamentals of salesforce, from managing customer data and tracking sales opportunities to automating workflows and generating insightful reports. It opens participants to the world's leading customer relationship management (CRM) platform and its applications in driving business growth, customer engagement, and operational efficiency. Through practical exercises, participants will learn how to use Salesforce tools to enhance productivity, improve customer interactions, and support data-driven decision-making across business functions.

WHO SHOULD ATTEND?

This course is designed for sales professionals, marketing specialists, customer service representatives, business analysts, managers, and other professionals who want to leverage Salesforce to strengthen client relationships, streamline business processes, and improve organizational performance. It is also suitable for non-technical professionals seeking practical CRM skills to apply in their daily work.

COURSE OUTCOMES

Delegates will gain the skills and knowledge to:

- Explain the important features and functionalities of Salesforce.
- Manage customer information and track sales opportunities effectively.
- Use Salesforce dashboards and reports for data-driven insights.
- Automate workflows to enhance productivity and efficiency.
- Apply Salesforce tools to improve customer service and engagement.
- Customize Salesforce for specific business needs and functions.
- Collaborate within teams using Salesforce for shared business objectives.

KEY COURSE HIGHLIGHTS

At the end of the course, you will understand;

- Salesforce CRM fundamentals and navigation.
- Sales pipeline management and opportunity tracking.
- Workflow automation and productivity tools.
- Reports and dashboards for performance monitoring.
- Customer service and marketing applications in Salesforce.
- Customization features for business-specific needs.
- Hands-on practice with real-world Salesforce use cases.

All our courses are dual-certificate courses. At the end of the training, the delegates will receive two certificates.

1. A GTC end-of-course certificate
2. Continuing Professional Development (CPD) Certificate of completion with earned credits awarded