CRM & Salesforce Strategy and Optimization for Business Growth Training Course

07 - 11 Sep 2026

Lisbon

4400 € (Per Person)

Ref: #SAL3504_490203

Course Introduction / Overview:

This training course is specifically designed to help businesses move beyond basic CRM usage, transforming their Salesforce platform into a strategic powerhouse for sustained growth. In today's competitive market, a CRM system is much more than a tool for tracking contacts, it is the central nervous system for customer engagement and a critical driver of revenue. This course dives deep into advanced Salesforce functionalities and CRM optimization strategies that are essential for modern enterprises. Participants will learn how to align their CRM efforts with overall business goals, leveraging data analytics, automation, and a holistic approach to customer relationships. We will explore key principles from prominent authors and thinkers in the field, such as Francis Buttle, in his book "Customer Relationship Management: Concepts and Technologies," to provide a strong theoretical foundation. This includes understanding the strategic framework of customer experience, managing relationships, and using emerging trends like big data and AI to gain a competitive edge. BIG BEN Training Center has designed this program to ensure every participant leaves with the practical skills needed to turn their Salesforce instance into a dynamic, performance-driven asset. The curriculum moves from foundational principles to hands-on optimization techniques, making sure you can get the most out of your investment and turn your customer data into actionable business intelligence.

Target Audience / This training course is suitable for:

- Salesforce administrators and power users.
- Sales and marketing managers.
- Business analysts and strategists.
- CRM project managers and consultants.
- Customer service and support supervisors.
- IT professionals involved in CRM system management.
- Senior executives and department heads focused on business development and customer relationships.
- Government agencies and non-profit organization leaders.

Target Sectors and Industries:

- Technology and software companies.
- Financial services and banking.
- Healthcare and life sciences.
- Retail and e-commerce.
- Manufacturing and supply chain.
- Professional services and consulting.
- Government agencies and their equivalents.
- Telecommunications.
- Media and entertainment.
- Real estate.
- Energy and utilities.

Target Organizations Departments:

- Sales and business development.
- Marketing and communications.
- Customer service and support.
- Information technology (IT).
- Operations management.
- Strategic planning.
- Human resources and training.
- Finance and accounting.

Course Offerings:

By the end of this course, the participants will have able to:

- Develop and implement a comprehensive Salesforce governance plan.
- Optimize CRM data quality and integrity to ensure reliable reporting.
- Automate complex business processes using Salesforce tools.
- Design and build custom reports and dashboards for executive insights.
- Leverage advanced Salesforce features to enhance sales and service productivity.
- Align marketing campaigns with sales activities for a cohesive customer journey.
- Create and manage user security and data access for compliance.
- Identify and fix performance bottlenecks within the Salesforce platform.
- Use analytics and forecasting tools to predict sales trends and business outcomes.
- Implement change management strategies to drive user adoption and engagement.

Course Methodology:

This training course is built on a dynamic, hands-on methodology to ensure a deep and practical understanding of all concepts. The approach goes beyond simple lectures by combining interactive discussions, live system demonstrations, and real-world case studies to help participants connect theory with practice. We emphasize small-group collaboration and problem-solving, allowing attendees to work through common CRM challenges in a simulated business environment. A core component of our method is the use of practical exercises where participants will apply their knowledge directly to a Salesforce sandbox environment, building custom dashboards, automating workflows, and troubleshooting common issues in real time. We also use peer-to-peer feedback sessions and expert-led Q&A to address specific challenges faced by each participant. This training is about more than just knowing the features; it is about learning how to use them strategically. BIG BEN Training Center is committed to providing learning experience that is not only comprehensive and engaging but also directly applicable to the participant's day-to-day work, ensuring they can immediately begin optimizing their organization's CRM performance and driving better results.

Course Agenda (Course Units):

Unit One: Strategic CRM Foundations and Salesforce Governance.

- Understanding the modern CRM landscape and its role in business strategy.
- Establishing a robust Salesforce governance framework and best practices.
- Defining key performance indicators (KPIs) and aligning them with CRM goals.
- Planning for effective user adoption and change management.
- Analyzing the current state of a CRM system and identifying areas for optimization.
- Developing a long-term roadmap for Salesforce growth.
- Managing stakeholders and their expectations throughout the CRM lifecycle.

Unit Two: Advanced Salesforce Data Management and Optimization.

- Improving data quality through validation rules and data cleansing.
- Implementing data import and export strategies with Data Loader.
- Designing an effective security model with profiles, roles, and permission sets.
- Managing complex data relationships and record access.
- Auditing data usage and performance to identify bottlenecks.
- Using schema builder to visualize and optimize the data model.
- Creating a data backup and recovery plan for business continuity.

Unit Three: Process Automation and Workflow Enhancement.

- Automating business processes with Flow Builder and Process Builder.
- Creating approval processes for sales and operations.
- Building custom business logic with validation rules and formula fields.
- Using email alerts, tasks, and field updates to streamline workflows.
- Designing and implementing a lead qualification and routing system.
- Automating case management and service escalations.
- Optimizing sales pipeline stages with automated rules.

Unit Four: Advanced Analytics, Reports, and Dashboards.

- Building complex reports with custom report types and filters.
- Creating dynamic dashboards to visualize key business metrics.
- Leveraging Salesforce Einstein Analytics for deeper insights.
- Using forecasting to predict sales and revenue.
- Developing a system for tracking user activity and system performance.
- Sharing and scheduling reports to keep the team informed.
- Customizing report charts and visualizations for executive presentations.

Unit Five: Integration and Continuous Improvement.

- Understanding Salesforce integration options with external systems.
- Using the AppExchange to extend Salesforce functionality.
- Developing a plan for continuous CRM optimization.
- Conducting regular system audits and performance reviews.
- Staying current with new Salesforce releases and features.
- Planning for scalable growth and future system enhancements.
- Measuring the return on investment (ROI) of CRM optimization efforts.

FAQ:

Qualifications required for registering to this course?

There are no requirements.

How long is each daily session, and what is the total number of training hours for the course?

This training course spans five days, with daily sessions ranging between 4 to 5 hours, including breaks and interactive activities, bringing the total duration to 20 - 25 training hours.

Something to think about:

In an increasingly automated world, how can a deep understanding of CRM data and system optimization transform human-centric sales and service roles from reactive tasks to proactive, strategic drivers of business growth?

What unique qualities does this course offer compared to other courses?

This training course stands out from others by not simply focusing on how to use Salesforce, but on how to strategically optimize it to drive genuine business value. We move beyond the basic features to explore advanced concepts like data governance, complex process automation, and performance analytics, which are often overlooked in standard training. The curriculum is built on a practical, hands-on methodology, ensuring that participants do not just absorb information but actively apply it in a simulated environment. We incorporate real-world case studies and frameworks from academic leaders like Francis Buttle, giving the content a robust and credible foundation. The training goes deep into data integrity, which is a critical yet challenging aspect of CRM management, and teaches participants how to leverage their data for predictive insights, not just historical reporting. Furthermore, our focus on changing management and user adoption ensures that the knowledge gained can be successfully implemented within any organization, leading to a higher return on investment for their Salesforce platform. BIG BEN Training Center has developed a program that equips professionals with the strategic mindset and tactical skills needed to transform their CRM from a simple database into an engine for sustainable business growth and competitive advantage.