

Salesforce Business Analysis/Administration Training and Placement Program

COURSE DETAILS DOCUMENT

• LIVE Live - Online



In-person



Private Team Training

Prerequisites

Truly speaking, there are no prerequisites to become a successful Salesforce Business Analyst/Admin. But it would be nice to have the following:

- Basic computing skills (MS Office like Word, Excel and PowerPoint).
- Decent communication skills (verbal and writing in English).
- Comfortable talking to people.
- Normal analytical skills.
- If you have these three things, we guarantee to transform you into an AI business analyst.

In today's rapidly evolving digital landscape, organizations across industries are embracing Customer Relationship Management (CRM) solutions to enhance sales, service, and marketing operations. Salesforce, the world's leading CRM platform, has become a critical tool for businesses striving to optimize customer experiences and drive data-driven decisions. As Salesforce adoption continues to grow, the demand for skilled Salesforce Business Analysts who can bridge the gap between business needs and technical solutions is at an all-time high.

The role of Salesforce Business Analyst goes beyond traditional analysis—it requires a strong understanding of Salesforce features, cloud platforms, process automation, and stakeholder engagement. Business Analysts must be equipped to gather requirements, design effective workflows, interpret data, and work collaboratively with developers and administrators to implement scalable solutions.

Recognizing this industry demand, Skillcubator's Salesforce Business Analyst Training is designed to prepare aspiring professionals and career changers with the essential skills, tools, and hands-on experience needed to excel in this dynamic role. Whether you're transitioning from a general BA background or entering the Salesforce ecosystem for the first time, this program provides a structured path to becoming a job-ready Salesforce Business Analyst.

Is This Program Right for You?

This program is ideal for individuals who are looking to launch or advance a career at the intersection of business analysis and cloud-based CRM solutions. You'll benefit from this training if you are:

- Aspiring Business Analysts who want to specialize in the high-demand Salesforce ecosystem.
- Current Business Analysts seeking to enhance their technical skill set and transition into Salesforce projects.
- Salesforce Admins or Developers looking to expand their understanding of business processes and stakeholder engagement.
- Career Changers from non-technical backgrounds aiming to enter the tech industry through a business-focused role.
- Project Managers, QA Analysts, or Consultants who regularly interact with Salesforce implementations and want a deeper understanding of BA responsibilities.
- Students or Recent Graduates interested in practical, job-ready skills that open doors to technology careers.

If you're passionate about solving business problems, working with data, and facilitating digital transformation, this program will equip you with the tools, techniques, and hands-on experience needed to succeed as a Salesforce Business Analyst.

Course Objective:

The Salesforce Business Analyst Training Program is designed to equip learners with the knowledge, skills, and practical experience required to succeed in a business analyst role within the Salesforce ecosystem. By the end of this program, participants will be able to:

- Understand the fundamentals of Salesforce CRM and its core products, including Sales Cloud, Service Cloud, and Marketing Cloud.
- Analyze and document business processes, requirements, and user stories using industry-standard BA techniques.
- Translate business needs into Salesforce functionality through collaboration with stakeholders, developers, and administrators.
- Use tools such as Salesforce Reports, Dashboards, and Flows to deliver data-driven insights and process automation.
- Gain hands-on experience with Salesforce tools and environments, including sandbox and production environments.
- Apply Agile and Scrum methodologies in the context of Salesforce implementation projects.
- Prepare for real-world business analyst interviews with role-based case studies, mock interviews, and resume support.

This course aims to provide a job-ready skill set that prepares participants to effectively contribute to Salesforce projects from day one and pursue roles such as Salesforce Business Analyst, CRM Analyst, Functional Consultant, or Product Analyst.

Course Outline

Module 1

1.0 Introduction to Salesforce Ecosystem

- Overview of Salesforce CRM and its ecosystem.
- Key Salesforce products: Sales Cloud, Service Cloud, Marketing Cloud, Analytics Cloud and Einstein AI.
- Roles & responsibilities of a Salesforce Business Analyst.
- Introduction to Trailhead and Salesforce certifications.

1.2 Business Analysis Fundamentals

- What is Business Analysis?
- Understanding SDLC: Waterfall vs Agile vs Hybrid models.
- Stakeholder Identification & Management.
- Requirement Elicitation Techniques (Interviews, Workshops, Surveys, JAD sessions).
- Functional vs Non-functional requirements.
- Business Process Modeling Notation (BPMN).

1.3 Salesforce Admin Essentials for BAs

- Navigating Salesforce Lightning UI.
- Standard vs Custom Objects.
- Record Types, Page Layouts, Fields, and Validation Rules.
- Reports and Dashboards basics.
- User Roles, Profiles, and Permission Sets.
- Understanding App Builder.

1.4 Agile & Scrum for Salesforce Projects

- Agile Manifesto and Principles.
- Scrum roles: Product Owner, Scrum Master, Development Team, BA.
- User Story creation and management in Salesforce context.
- Definition of Ready (DoR) and Definition of Done (DoD).
- Story Estimation: Story points, T-Shirt Sizing.
- Managing Product Backlog and Sprint Planning.

1.5 Requirement Gathering & User Stories in Salesforce

- Writing effective User Stories with Acceptance Criteria.
- Mapping Business Requirements to Salesforce Features.
- Creating Epics, Features, Stories using tools like Jira or Azure DevOps.
- Use Case diagrams and process flowcharts using Lucidchart / Visio.

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Module 2

2.1 Data Management in Salesforce

- Understanding Data Model & Schema Builder.
- Data Migration basics (Data Loader, Data Import Wizard).
- Master-Detail vs Lookup Relationships.
- Data Quality, Deduplication & Governance.
- Introduction to Change Sets and Sandboxes.

2.2 Declarative Tools & Automation in Salesforce

- Workflow Rules vs Process Builder vs Flows.
- Approval Processes.
- Introduction to Salesforce Flow Builder (Record-Triggered, Scheduled).
- Automation use cases for Business Analysts.
- Real-world Scenarios and Hands-on Labs.

2.3 Integration Basics for BAs

- What is Integration? When is it needed?
- Overview of APIs (REST, SOAP).
- Integration tools overview: MuleSoft, Workato, Salesforce Connect.
- High-level Data Flow Diagrams and Sequence Diagrams.
- Real-time vs Batch integration scenarios.

Module 3

3.1 Reporting and Analytics in Salesforce

- Building Reports & Dashboards.
- Custom Report Types.
- Row-level and field-level security.
- Use cases: Sales Performance, Lead Pipeline, Support Ticket Metrics.
- Embedded analytics and Einstein Analytics (overview).

3.2 Testing, UAT & Deployment Support

- Types of Testing: Unit, Integration, UAT.
- Creating Test Scripts and Test Scenarios.
- Coordinating UAT with stakeholders.
- Defect logging and management using tools like Jira.
- Change sets and deployment readiness checklists.

Module 4

4.1 Real-World Projects and Case Studies

- Case Study 1: Implementing Lead Management in Sales Cloud.
- Case Study 2: Automating Service Requests with Flow.
- Case Study 3: Building Reports for Executive Dashboards.
- Mock Workshops: Elicitation, User Story Writing, Stakeholder Interviews.
- Capstone Project: End-to-end Salesforce Business Analysis.

4.2 Resume, Interview & Placement Support

- Crafting a BA resume for Salesforce roles.
- Behavioral Interview Preparation.
- Mock Interviews with Salesforce BAs and Recruiters.
- LinkedIn Profile Optimization.
- Placement Assistance with partner firms.

Features

- Training Program as per Latest Industry Demand.
- IIBA Endorsed Education Provider.
- Access to Learning Management System (LMS).
- Free PSM-I and PSPO-I training are included in the package.
- 40 PDUs/CDUs.
- IIBA Certified Instructors with 20 plus years of experience.
- Plenty of case studies, In-Class exercises, quizzes, and take-home assignments.
- 15 Plus Industry-Standard tools.
- Personalized Resume, LinkedIn Profile makeover and Cover Letter.
- Course aligned to IIBA's BABOK 3.0 and PMI's body of knowledge.
- Comprehensive Capstone project.
- Experiential learning through case studies

Software/Tools Used for this training

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| <ul style="list-style-type: none">• Salesforce Sandbox Environment / Salesforce Trailhead.• Jira / Azure DevOps.• Confluence. | <ul style="list-style-type: none">• Visio / Lucidchart / Gliffy.• Microsoft Word, Excel & PowerPoint.• Balsamiq, Mockflow. |
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Duration

Weekend Batch

- 10-12 weeks (Saturday and Sunday from 11:00 AM EST to 2:00 PM EST).

Weekday Batch

- 10-12 weeks (Monday, Tuesday and Thursday from 08:00 PM EST to 10:00 PM EST).

(Core Training Hours: 60 hours)

Fees

1500 USD + 5.3% Sales Tax.

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