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Sign up

Salesforce CRM Analytics Training

2 days (14 hours)

Overview

Salesforce CRM Analytics (formerly Tableau CRM) enables you to transform your Salesforce and external data into interactive, reliable, and actionable dashboards. You will learn how to build analytics focused on sales management, service, and forecasting, with appropriate governance.

This training aims to help you master the entire process: connecting data sources, preparing datasets, modeling, creating dashboards, and securely sharing them with users. The focus is on best practices for performance, data quality, and business interpretation.

The approach is resolutely hands-on: guided workshops, demos, and exercises based on real-world scenarios (pipeline, activity, conversion). You'll leave with documented datasets, a reusable analytical model, ready-to-use dashboards, and a deployment checklist.

Like all our training courses, this one will introduce you to **the latest stable version** of the technology and its new features.

Objectives

- Connect and ingest Salesforce and external data.
- Prepare, clean, and enrich datasets.
- Model relationships and analytical metrics.
- Design interactive and relevant dashboards.
- Manage security, sharing, and performance of analytics.

Target Audience

- Salesforce administrators and consultants
- BI analysts / data analysts
- CRM/data project managers
- Sales reporting managers

Prerequisites

- Basic knowledge of Salesforce (objects, fields, reports)
- Basic understanding of data modeling (tables, keys, aggregations)
- Understanding of KPIs (pipeline, conversion rate, SLAs)
- Basic understanding of Salesforce security (profiles, roles, sharing)

Technical prerequisites

- PC/Mac with at least 8 GB of RAM (16 GB recommended)
- Windows 10/11, macOS, or Linux; up-to-date Chrome or Edge browser
- Access to a Salesforce org with CRM Analytics enabled
- Spreadsheet tool (Excel/Sheets) and CSV files for the workshops

Our Salesforce CRM Analytics Training Program

[Day 1 - Morning]

Getting started with CRM Analytics and the fundamentals of Salesforce data

- Positioning: CRM Analytics vs. Salesforce reports/dashboards, use cases (Sales, Service, Marketing)
- Navigation and components: Apps, Datasets, Dashboards, Lenses, Recipes
- Salesforce data model: objects, relationships, fields, security (profiles, roles, sharing)
- Governance principles: data quality, naming conventions, environments (sandbox/production)
- Hands-on workshop: Explore a CRM Analytics app, open a Lens, and analyze an existing dataset.

[Day 1 - Afternoon]

Data ingestion and preparation: Dataflows, Recipes, and Data Manager

- Set up a Salesforce connection and select the objects/fields to sync
- Understand datasets: schema, field types, indexing, refresh
- Prepare data with Recipes: filters, formulas, joins, aggregations
- Performance best practices: data reduction, calculated fields, refresh scheduling
- Hands-on workshop: Build a Recipe to create a “Pipeline & Activities” dataset ready for analysis.

[Day 2 - Morning]

Analysis and data visualization: Lenses, Dashboards, and interactions

- Creating Lenses: measures/dimensions, filters, comparisons, sorting, and grouping
- Choosing the right visualization: KPIs, bars, lines, heatmaps, tables, distributions
- Building a dashboard: pages, widgets, global filters, actions, and navigation
- Interactivity: bindings, cross-selections, parameters, and drill-down
- Hands-on workshop: Create a “Sales Tracking” dashboard with filters (period, team) and drill-down on opportunities.

[Day 2 - Afternoon]

Security, sharing, and standardization of analytics

- CRM Analytics security model: Salesforce inheritance, sharing of apps/dashboards/datasets
- Row-Level Security: principles, access rules by user/team, validation of results
- Planning and monitoring: refresh, dependencies, error handling, and alerts
- Lifecycle: packaging, sandbox and production deployment, documentation, and standards
- Hands-on workshop: Set up RLS by sales team and publish a dashboard with controlled permissions.

Companies involved

This training is designed for both individuals and businesses—large or small—that wish to train their teams in new, advanced IT technologies or to acquire specific industry knowledge or modern methodologies.

Entry-Level Assessment

The pre-training assessment complies with Qualiopi quality standards. Upon final registration, the learner receives a self-assessment questionnaire that allows us to evaluate their estimated proficiency in various types of technologies, as well as their expectations and personal goals for the upcoming training, within the limits imposed by the selected format. This questionnaire also allows us to anticipate certain connection or internal security issues within the company (intra-company or virtual classroom) that could pose challenges for monitoring and ensuring the smooth running of the training session.

Teaching Methods

Practical Course: 60% Practical, 40% Theory. Training materials distributed in digital format to all participants.

Organization

The course alternates between theoretical input from the trainer, supported by examples and reflection sessions, and group work.

Certification

At the end of the session, a multiple-choice quiz is used to verify that the skills have been properly acquired.

Certification

A certificate will be issued to each trainee who has completed the entire training program.