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Salesforce Lightning Experience Training

3 days (21 hours)

Overview

Salesforce Lightning Experience is Salesforce's modern interface designed to simplify the management of customers, prospects, opportunities, and sales activities. It allows users to centralize their information and effectively track their activities from a single environment.

Our Salesforce Lightning Experience: Getting Started training course will help you become self-sufficient in your daily use of Salesforce. You'll learn how to navigate the interface, search for information, and manage key objects such as leads, accounts, contacts, and opportunities.

You'll learn how to organize your data using list views and Kanban boards, track your tasks and activities, and collaborate with other users within Salesforce.

You'll also discover how to create and use reports and dashboards to track your activities, your sales pipeline, and the key metrics relevant to your role.

By the end of this training, you'll be able to use Salesforce Lightning Experience independently to manage your data, track your activities, and leverage the information you need for your daily work.

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

Objectives

- Navigate Salesforce Lightning Experience effectively

- Manage leads, accounts, contacts, and opportunities
- Organize and quickly find Salesforce data
- Manage tasks, activities, and customer interactions
- Collaborate with other users in Salesforce
- Create and use reports and dashboards

Target Audience

- Beginner Salesforce users
- Sales representatives and sales teams
- Sales managers
- Customer service teams
- Professionals who use Salesforce on a daily basis

Prerequisites

- No prior knowledge of Salesforce is required
- General knowledge of using web applications
- Basic understanding of CRM and the sales cycle is a plus

Technical Prerequisites

- Computer running Windows, macOS, or Linux
- Up-to-date web browser
- Stable internet connection
- Access to a Salesforce Lightning Experience environment for hands-on exercises

Salesforce Lightning Experience Training Curriculum : Getting Started

[Day 1 - Morning]

Getting Started with Salesforce Lightning Experience

- Explore the Salesforce Lightning Experience interface and its layout
- Use the App Launcher, tabs, favorites, and global search
- Navigate between Salesforce applications, objects, and records
- Customize your workspace and quickly access useful information
- Use notifications and key productivity features
- Hands-on workshop: navigating Lightning Experience and organizing your workspace based on your activities.

[Day 1 - Afternoon]

Manage leads, accounts, contacts, and opportunities

- Understand the main Salesforce objects: Leads, Accounts, Contacts, and Opportunities
- Create, edit, and view records
- Qualify a lead and track its progress through the sales pipeline
- Manage accounts, contacts, and related information
- Track opportunities, their stages, and sales pipeline information
- Hands-on Workshop: Process a lead, convert it, and then track the resulting opportunity as it moves through the pipeline.

[Day 2 - Morning]

Organizing and retrieving Salesforce data

- Create and use list views tailored to your needs
- Filter, sort, and organize the displayed information
- Use the Kanban view to view and update records
- Use the global search to quickly find data
- Understand the principles of data quality and updates in Salesforce
- Hands-on workshop: Build a custom work view to track and update a portfolio of opportunities.

[Day 2 - Afternoon]

Manage your activities and collaborate in Salesforce

- Create and track tasks, events, and activities associated with records
- Using email and the activity log in Lightning Experience
- Plan and track next sales actions
- Collaborate with other users using Chatter, mentions, and comments
- Use Path and Guidance to track the different steps in a process
- Hands-on workshop: Organize customer account follow-up with tasks, activities, communications, and next steps.

[Day 3 - Morning]

Create and analyze reports and dashboards

- Understand how Salesforce reports work
- Create a report and select relevant information
- Use filters, groupings, and sorting to analyze data
- Read and interpret the key metrics on a dashboard
- Use subscriptions to regularly track key metrics
- Hands-on workshop: Create a sales report and build a pipeline tracking dashboard.

[Day 3 - Afternoon]

Become more self-sufficient with Lightning Experience

- Leverage the key features of Lightning Experience in your daily work
- Understand the impact of roles and permissions on access to data and features
- Identify best practices for entering, updating, and sharing data
- Customize your use of Salesforce without changing the organization's overall configuration
- Identify features tailored to key business and collaboration needs
- Hands-on workshop: Create a complete user journey combining search, data management, activities, collaboration, and reporting.

Target Audience

This training is intended for both individuals and companies—large or small—that wish to train their teams in new, advanced IT technology or to acquire specific business knowledge or modern methods.

Pre-training 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 with 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

Hands-On Training: 60% Practical, 40% Theoretical. Training materials distributed in digital format to all participants.

Organization

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

Assessment

At the end of the session, a multiple-choice quiz is administered to verify that participants have successfully acquired the skills.

Certification

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