

Salesforce: Strategic Customer Management and Business Performance

Lecturer: Elmi Giovetti

Language

English

Course description and objectives

This course offers an exploration of Salesforce, one of the leading CRM platforms globally, focusing on its strategic application within business environments. Through a combination of theoretical insights and practical exercises, students will gain a comprehensive understanding of Salesforce architecture, customization capabilities, and its role in enhancing customer relations and business processes. By the end of the course, participants will be able to design, implement, and optimize Salesforce solutions, fostering innovation and driving efficiency in organizational workflows.

Audience

The course is open to all Bocconi students. In particular, it is designed for those interested in business, marketing, and technology, as well as those looking to deepen their understanding of CRM systems and digital transformation. Students will gain practical experience with the Salesforce platform, learning to navigate its key features such as CRM customization, data management, and process automation. The course aims to equip students with valuable skills that can be applied in real-world business scenarios, enhancing their ability to drive customer relationship strategies and contribute to the success of digital initiatives in companies.

Prerequisites

There are no specific prerequisites for this course, though a basic understanding of business processes, marketing concepts, and technology will be helpful. Familiarity

with general CRM systems or prior experience with cloud-based software may enhance the learning experience, but is not required. The course is designed to accommodate students from various academic backgrounds, with content tailored to both beginners and those with some prior exposure to Salesforce or similar platforms.

Guidelines

Registration:

You can sign up for the course only through the yoU@B student Diary, in the "**sign-up for various activities**" box (please note that the box appears only when registrations open. Before then it will not be visible).

You can only cancel your registration by diary **no later** than the registration deadline for the course itself. No other ways of cancellation are allowed. Registration will be confirmed a few days before the start of the course through a message posted in the yoU@B student Diary.

Attendance:

- Attendance of **75% or more** of class hours: obtainment of the **Open Badge**
- Attendance of **less than 25%** of class hours: **blacklisting**

Duration

16 hours

Teaching mode

This course will be taught in person. Distance mode will not be provided.

Calendar

Lecture	Date	Time	Room
1	Wed 19/03/2025	18.15 - 19.45	N04 (Velodromo)
2	Sat 22/03/2025	9.30 - 11.00	1 (Sarfatti)
3	Sat 22/03/2025	11.15 - 12.45	1 (Sarfatti)
4	Mon 24/03/2025	18.15 - 19.45	N04 (Velodromo)
5	Wed 26/03/2025	18.15 - 19.45	N04 (Velodromo)

6	Sat 29/03/2025	9.30 - 11.00	1 (Sarfatti)
7	Sat 29/03/2025	11.15 - 12.45	1 (Sarfatti)
8	Mon 31/03/2025	18.15 - 19.45	N04 (Velodromo)

Note: lessons will be held in the traditional room and **all the students have to bring their own device.**

Syllabus of the course

Lecture	Topics
1	<p><i>CRM Concepts</i></p> <ul style="list-style-type: none"> - CRM strategies: acquisition, retention, and loyalty - Customer journey mapping and touchpoints - Best practices for CRM implementation - Data-driven decision-making and customer insights
2	<p><i>Introduction to CRM and Salesforce</i></p> <ul style="list-style-type: none"> - Overview of Salesforce and its core functionalities - Types of CRM systems and Salesforce in the global context - Benefits of Salesforce for businesses (scalability, integration, customization) - Business case introduction
3	<p><i>Sales Cloud: managing sales and opportunities</i></p> <ul style="list-style-type: none"> - Managing leads, accounts, and opportunities - Sales forecasting and pipeline management - Automating sales processes with workflows - Sales performance tracking and reporting
4	<p><i>Salesforce CPQ: optimizing quotes and pricing</i></p> <ul style="list-style-type: none"> - Introduction to CPQ and its benefits - Creating customized quotes and pricing models - Automating discounting and approvals

Lecture	Topics
5	<p><i>Marketing Cloud: generating demand and campaigns</i></p> <ul style="list-style-type: none"> - Creating and managing marketing campaigns in Salesforce - Customer segmentation and targeting - Personalizing campaigns with Salesforce data - Measuring campaign performance
6	<p><i>Customer support with Service Cloud</i></p> <ul style="list-style-type: none"> - Managing customer support lifecycle with cases - Automating case management and task assignment - Diversifying support channels (chat, email, social media) - Reporting on support performance and quality
7	<p><i>Data analysis with Salesforce</i></p> <ul style="list-style-type: none"> - Creating custom reports and dashboards - Visualizing KPIs and performance metrics in real time - Using advanced data analysis tools for decision-making - Sharing insights with stakeholders via reports and dashboards
8	<p><i>Business process optimization with Salesforce</i></p> <ul style="list-style-type: none"> - Automating workflows and business processes - Integrating Salesforce with other business systems - Optimizing team collaboration and efficiency - Best practices for improving business performance with Salesforce

Software used

During the course, Salesforce will be used – instructions on how to log in will be provided.

Suggested bibliography

During the course, the professor will provide guidance on any readings and documentation available online and/or in print.

Available seats

This activity is limited to **110** participants. Registration cannot be carried out once this number has been reached or after closing the registration period.

Please remember that you may unsubscribe from ITEC courses only before the registration deadline.