

# Salesforce CRM and Trailhead Modules

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What Class is this Assignment for?

Introduction to  
Professional  
Selling



# Why Do I do these Assignments?

- ▶ Valuable skill
- ▶ Great starting point
- ▶ Gamification
- ▶ Customization
- ▶ Reinforces class material
- ▶ Help manage a prospecting assignment



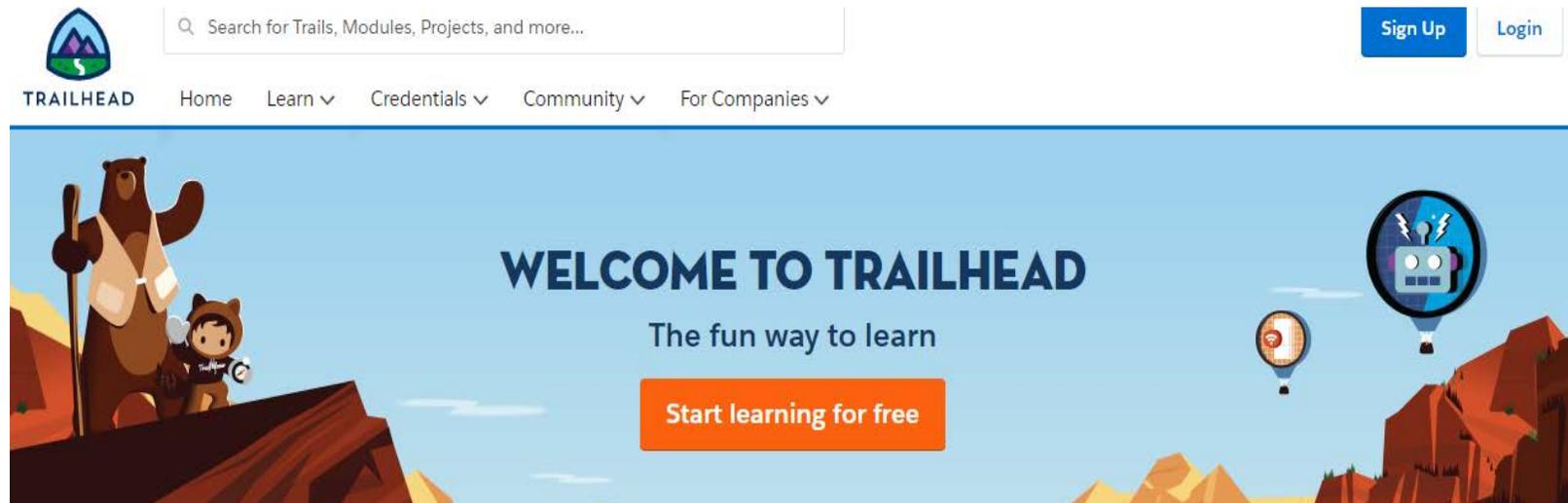
# Example of Trailhead Modules

## Assignment Guideline:

- ▶ Trailhead modules are available for you to explore, experiment with and earn points and badges in order to get a better understanding of Salesforce CRM. There are 544 modules on the site (<https://trailhead.salesforce.com>) and you are free to play with and complete as many as you like.
- ▶ Sign in using your salesforce account and keep in mind that Trailhead is just a sandbox and the changes you make on it does not get reflected on your salesforce account.
- ▶ To get full credit for this assignment, you must earn minimum of 5000 points and three out of the four modules (links provided on eLearning) must be completed. After the completion of these three, you are free to choose whatever modules you like to earn the remaining points.
- ▶ Submit the screenshots of the points and completed modules on eLearning by July 17, 2019 at 8:30 a.m.

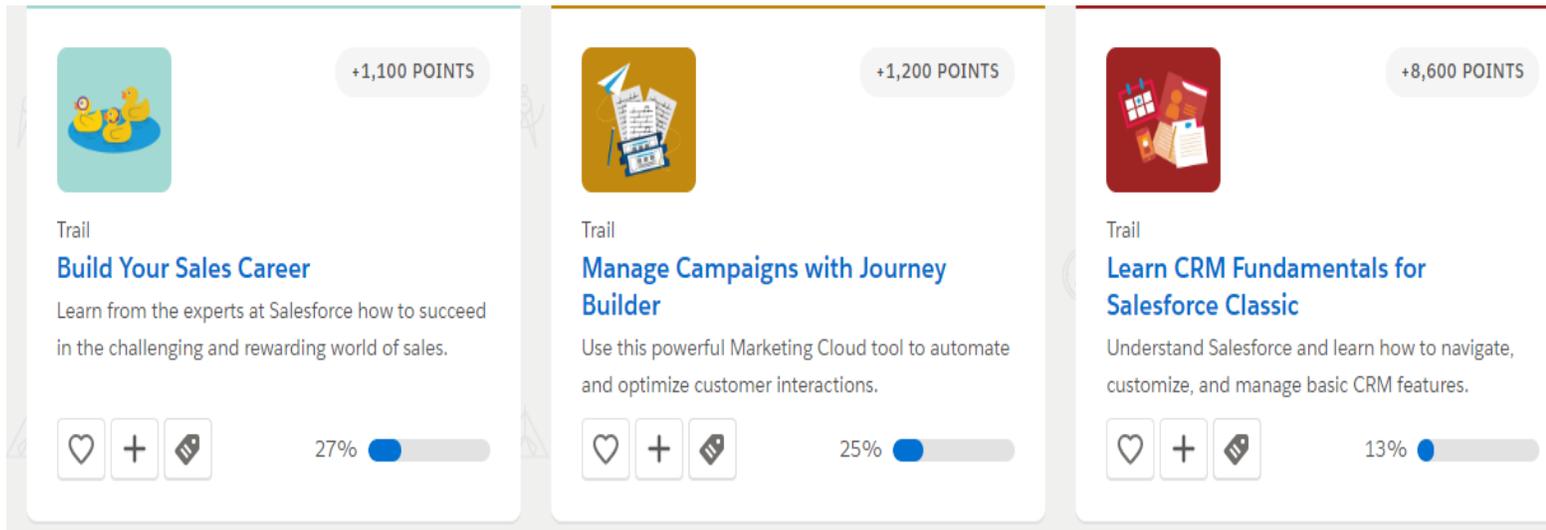
# Signing up for a free Trailhead account

- ▶ Go to [www.trailhead.salesforce.com](https://www.trailhead.salesforce.com)
- ▶ Create a free account
- ▶ Take advantage of their great customer support if you need it



# Suggested Trails and Modules

- ▶ Go to [www.trailhead.salesforce.com](http://www.trailhead.salesforce.com)
- ▶ Sign in
- ▶ Under “Learn” tab choose “various trails”
- ▶ Choose from more than 140 trails



The screenshot displays three trail cards from the Trailhead platform. Each card includes an icon, a title, a description, a progress indicator, and a point value.

Trail Title	Points	Progress
Build Your Sales Career	+1,100 POINTS	27%
Manage Campaigns with Journey Builder	+1,200 POINTS	25%
Learn CRM Fundamentals for Salesforce Classic	+8,600 POINTS	13%

**Trail 1: Build Your Sales Career**  
+1,100 POINTS  
Trail  
Learn from the experts at Salesforce how to succeed in the challenging and rewarding world of sales.  
Progress: 27%

**Trail 2: Manage Campaigns with Journey Builder**  
+1,200 POINTS  
Trail  
Use this powerful Marketing Cloud tool to automate and optimize customer interactions.  
Progress: 25%

**Trail 3: Learn CRM Fundamentals for Salesforce Classic**  
+8,600 POINTS  
Trail  
Understand Salesforce and learn how to navigate, customize, and manage basic CRM features.  
Progress: 13%

# Suggested Trails and Modules Cont'd

- ▶ Under "Learn" tab choose "various modules"
- ▶ Your Role- Business User
- ▶ Your Level- Beginner
- ▶ Choose from more than 240 modules

Showing 246 modules out of 544



+300 POINTS

Module

## Business Value of Equality

Understand the societal and business value of having a diverse, inclusive workforce.



~45 mins



+600 POINTS

Module

## Salesforce B2C Commerce Project Management

Learn how to successfully manage B2C Commerce projects.



~1 hr



+200 POINTS

Module

## Account Data Strategies

Learn how your sales team can use data to close deals.



~20 mins

# Suggested Modules

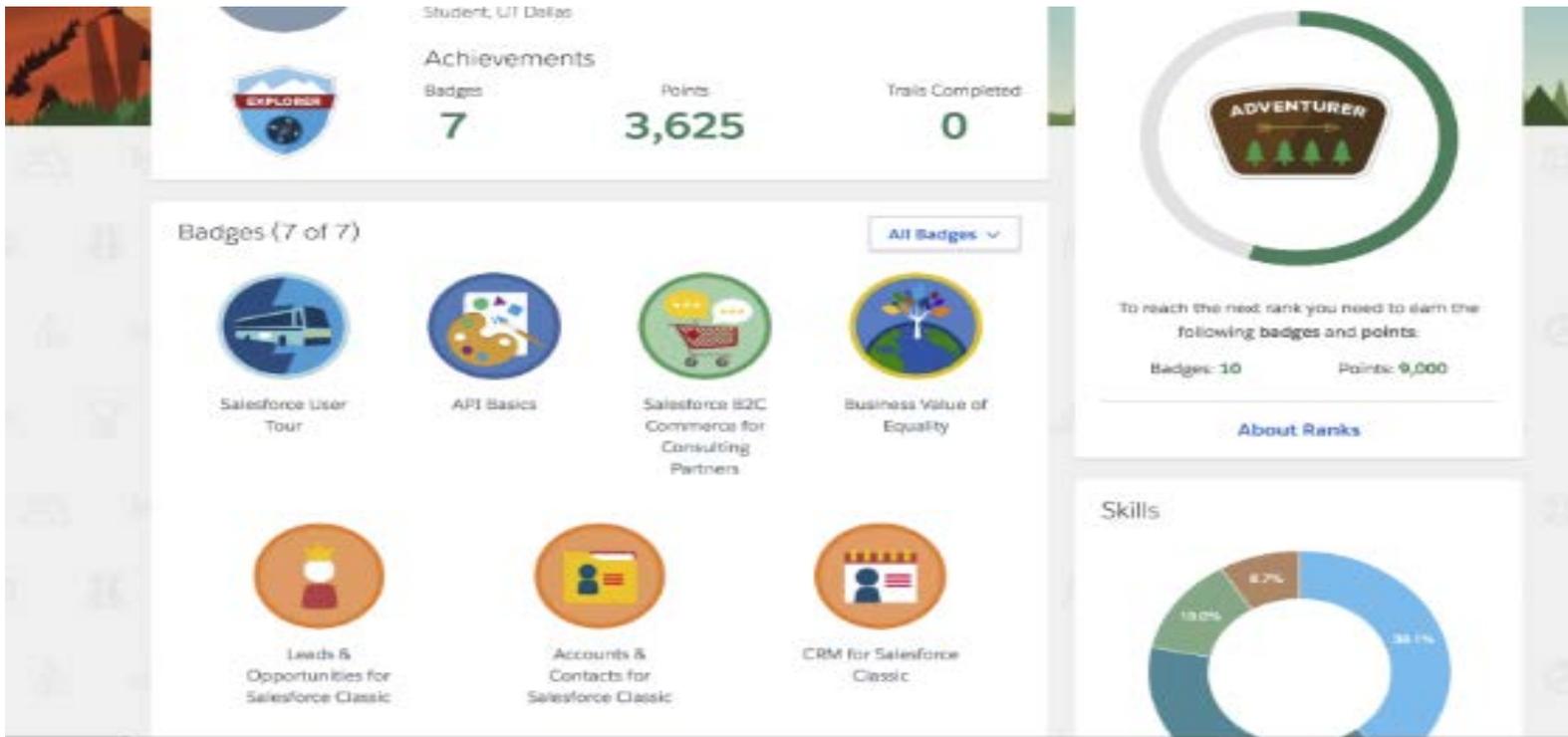
- ▶ Salesforce User Tour
- ▶ Explore Salesforce Essentials (search for this in the search bar)
- ▶ **Customer Journey Basics**
- ▶ **Accounts & Contacts for Salesforce Classic**
- ▶ Prospecting for better sales

# Suggested Modules

- ▶ [https://trailhead.salesforce.com/content/learn/modules/admin\\_intro\\_crm\\_basics](https://trailhead.salesforce.com/content/learn/modules/admin_intro_crm_basics)
- ▶ <https://trailhead.salesforce.com/content/learn/modules/prospecting-for-better-sales>
- ▶ <https://trailhead.salesforce.com/content/learn/modules/customer-journey-basics/get-started-with-customer-journeys>

# How Do the Students Submit?

A screenshot of the total score and badges is submitted via Blackboard.



# Helpful Suggestions!

- ▶ Dedicate one class time to go through the steps together
- ▶ Use Google Chrome (it just works better)
- ▶ Select some modules as must do (It provides a starting point)

# Signing up for a free Salesforce account

- ▶ Google search “Salesforce free trial”
- ▶ Create a free 30 day account
- ▶ Take advantage of their great customer support if you need it



**salesforce** Try the complete CRM solution, free for 30 days.

With Salesforce, you can:

- ✓ Set up simple lead scoring and routing
- ✓ Automate repetitive tasks
- ✓ Get a full view of rep, team, and pipeline performance

Questions? Talk to an expert: 1-800-667-6389

**Sign up now to start your free trial.**  
Please complete all fields.

First name

Last name

Job title

Email

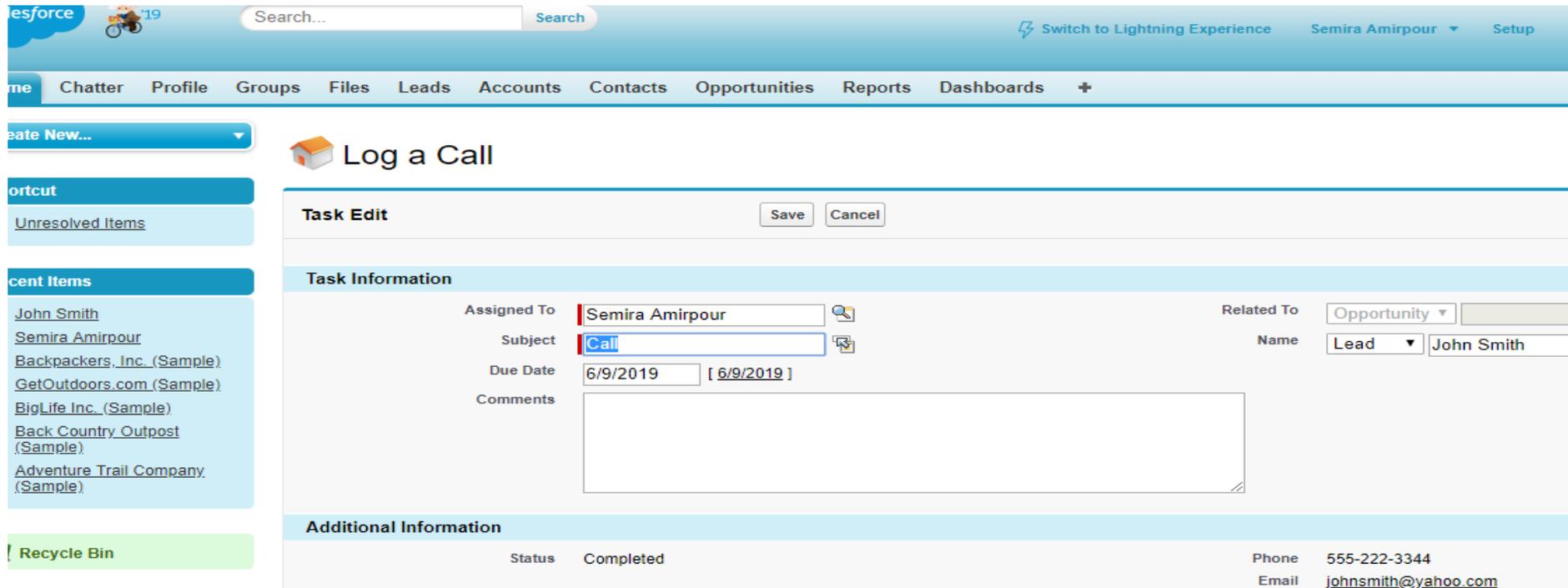
Phone

# Add Leads and Contacts

- ▶ Have students compile a list of their potential leads and contacts (10-50)
- ▶ Set aside a class session to sign in and work on it as a class
- ▶ Use “Salesforce Classic” (Just easier to use in my opinion)
- ▶ Add leads and contacts to Salesforce

# Log a Call

- ▶ Students can log calls and interactions on LinkedIn to build their library.



The screenshot shows the Salesforce 'Log a Call' form. The interface includes a top navigation bar with the Salesforce logo, a search bar, and user information for Semira Amirpour. Below the navigation bar is a menu with options like Home, Chatter, Profile, Groups, Files, Leads, Accounts, Contacts, Opportunities, Reports, and Dashboards. On the left side, there are sections for 'Create New...', 'Shortcut' (with 'Unresolved Items'), and 'Recent Items' (listing contacts like John Smith and Semira Amirpour). The main form area is titled 'Log a Call' and contains a 'Task Edit' section with 'Save' and 'Cancel' buttons. The 'Task Information' section includes fields for 'Assigned To' (Semira Amirpour), 'Subject' (Call), 'Due Date' (6/9/2019), and 'Comments'. The 'Related To' section shows 'Opportunity' related to 'Lead' for 'John Smith'. The 'Additional Information' section at the bottom shows the task status as 'Completed' and provides contact details: Phone 555-222-3344 and Email johnsmith@yahoo.com.

**Task Edit** [Save] [Cancel]

**Task Information**

Assigned To: Semira Amirpour

Subject: Call

Due Date: 6/9/2019 [ 6/9/2019 ]

Comments: [Empty text area]

Related To: Opportunity

Name: Lead John Smith

**Additional Information**

Status	Completed	Phone	555-222-3344
		Email	johnsmith@yahoo.com

# Make it your own!

- ▶ These assignments could be used separately or along with other assignments
- ▶ Explore for yourself
- ▶ Start small
- ▶ Let me know if you need help

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