

Salesforce Administration: CPD 0153

Overview

Salesforce Administrators are vital in solving business problems by customizing the Salesforce Platform to build, configure, and automate solutions that deliver significant business value. This Salesforce Administrator course is designed to help learners kick-start their careers as Salesforce Administrators with the knowledge, practical training, hands-on activities, and technical credentials they need to succeed in this role. Delivered fully online, this 10-week comprehensive program is taught by industry experts and supplemented with live/online mentor-led classes. With a focus on real-world scenarios, hands-on projects, and preparation for certification exams, learners will gain a comprehensive understanding of Salesforce fundamentals, ecosystem components, administration roles, and navigation interfaces.

The course prepares learners for the Salesforce Administrator Certification by complementing the strategic skills needed on the job with the skills and topics covered on the exam. The learner will leave the course with proof of their Salesforce Administrator skills with the following:

- 20+ Salesforce Trailhead badges
- Salesforce Administrator Strategic Playbook
- Hands-on experience in Salesforce and Salesforce Developer

Learners

Our course attracts learners who are motivated to expand their knowledge and grow their careers. Their backgrounds are wide and varied, including professionals in sales, project management, business operations, finance, IT/DevOps, and more. Our course is ideal for anyone who identifies with one of the following profiles:

- Career seekers looking to develop new skills and expand career opportunities as a Salesforce Administrator
- Career advancers looking to gain hands-on experience in Salesforce and build in-demand skills to improve opportunities for advancement
- Individuals in sales support roles who need skills in sales operations and CRM administration
- Entrepreneurs and business owners looking to create efficient processes and drive down costs

Authors and Instructors

The course is developed and taught by industry experts with extensive experience in Salesforce administration.

[Jodi Hbrek](#)

With two decades of experience leading Salesforce teams, Jodi offers actionable techniques and practical advice in her Amazon best-selling book, *Rock Your Role as a Salesforce Admin: Create Value, Calm the Chaos, and Supercharge Your Salesforce Career*.

[Rahil Jetly](#)

Rahil Jetly is a seasoned Revenue Operations leader with experience across diverse industries. At Carta, he has also served as a Fractional RevOps Consultant at Nemea Revenue Systems and an advisor at Sonar. Rahil has held key roles at companies like Enable, Pathrise, and NexHealth, where he built and optimized GTM strategies. Additionally, he co-founded Amazi Water Co., which focused on reducing plastic waste. Rahil shares his expertise on Medium, writing about RevOps, data, and marketing.

[Eric McBride](#)

Eric McBride is an accomplished Salesforce Solution Architect with extensive experience in sales operations and technology management. Currently, at Kicksaw, he brings over a decade of experience from leading roles at Coursera, HopSkipDrive, Friendbuy, and ServiceTitan. Eric is highly credentialed and holds multiple Salesforce certifications, including Certified Data Architect, Service Cloud Consultant, and Sharing and Visibility Architect. His expertise lies in optimizing Salesforce environments to drive business success, making him a valuable asset in both technical and operational domains.

Learning Outcomes

- **Navigate the Salesforce Administrator role as an influential player**, understanding the reasoning behind business requests, effectively prioritizing tasks, training users, and building scalable solutions that align with organizational growth.
- **Practice building real-world solutions in Salesforce**, applying hands-on experience to design processes, automate workflows, and manage data using realistic business scenarios and personas.
- **Develop the skills to implement scalable processes and systems** within Salesforce that meet current and future organizational needs, ensuring efficiency and long-term success.
- **Communicate as a strategic Salesforce Administrator**, confidently presenting your point of view, influencing decisions, and ensuring stakeholders are empowered to use Salesforce effectively.
- **Prepare to pass the Salesforce Associate and Administrator certifications**, gaining the knowledge and skills to tackle exam content and real-world applications confidently.

Certifications

Learners will build the skills necessary to pursue industry-leading credentials while progressing through the course and completing the required 22 Salesforce Trailhead modules.

Salesforce Associate Certification (optional)

Learners will complete Trailhead modules to develop a foundational understanding of reporting, user administration, sharing, customization, and data management. While the certification is not required to pass the course, learners are encouraged to pursue it to validate their knowledge.

Salesforce Administrator Certification (optional)

After completing the required Trailhead modules, learners can continue preparing for the Administrator Certification during the exam prep period, further practicing the features and functionality used to maintain a Salesforce implementation.

Curriculum

Objectives	Project
<p>Module 1: The Salesforce Administrator Mindset</p> <ul style="list-style-type: none">• Explore the diverse roles and responsibilities of Salesforce Administrators across different clouds, industries, and organizational structures.• Develop the critical mindsets that drive success for Salesforce Administrators in any environment.• Practice asking insightful questions before designing solutions and continuously throughout stakeholder engagements.• Apply a defined and optimized business process when executing solutions for organizational needs. <p>Earn two Salesforce Trailheads: <i>Create a Trailhead Playground and Salesforce Platform Basics.</i></p>	<p>Form a strategic approach to a given business challenge.</p>
<p>Module 2: Setting up Your Organization</p> <ul style="list-style-type: none">• Leverage personas to align Salesforce setup with end-user needs and daily workflows.• Discover key objects in a typical Salesforce environment, including sharing models, security controls, record types, and approval processes, using personas for optimized configuration.	<p>Set up a new role in your Salesforce organization.</p>

<ul style="list-style-type: none"> ● Tailor access management based on user personas, including account provisioning and de-provisioning, to fit team structures and business processes. ● Conduct regular audits to adjust permissions, ensuring security and compliance while meeting persona-driven access needs. ● Address user access issues by applying personas to ensure appropriate data and feature availability. <p>Earn three Salesforce Trailheads: <i>Company-Wide Org Settings, User Management, and Permission Set Groups.</i></p>	
<p>Module 3: Managing Your Organization’s Data</p> <ul style="list-style-type: none"> ● Identify tools for seamless data importing and exporting, optimizing daily operations for efficient data management. ● Implement strategies to maintain accurate, secure, and up-to-date data, including preventing duplication and errors to safeguard data integrity across the organization. ● Manage the data lifecycle, including security, backup, and recovery processes, to ensure business continuity and a streamlined Salesforce environment. ● Leverage accurate and well-managed Salesforce data to inform business decisions and strategic planning. <p>Earn three Salesforce Trailheads: <i>Data Security, Data Modeling, and Data Management.</i></p>	<p>Import/export data and create a data integrity management plan.</p>
<p>Module 4: Building Impactful Reports and Dashboards</p> <ul style="list-style-type: none"> ● Align Salesforce report and dashboard requests with business goals by understanding stakeholder needs and identifying underlying concerns. ● Evaluate, customize, and create Salesforce reports and dashboards that effectively communicate key insights and support stakeholder decision-making. ● Develop dynamic and actionable Salesforce dashboards that drive informed business decisions and improve organizational performance. 	<p>Build a dynamic dashboard.</p>

<ul style="list-style-type: none"> ● Provide training and support to stakeholders, enabling them to effectively use the dashboards and reports in their day-to-day operations. ● Diagnose and correct issues with reports and dashboards, ensuring accurate data representation. <p>Earn one Salesforce Trailhead: <i>Reports and Dashboards for the Lightning Experience.</i></p>	
<p>Module 5: Prototyping Solutions with Process Mapping</p> <ul style="list-style-type: none"> ● Define the roles and responsibilities of all functional departments involved in a business process, fostering a customer-centric approach. ● Create detailed business process maps that effectively visualize the steps required to achieve key business outcomes. ● Analyze existing process maps to uncover potential issues or bottlenecks, enabling targeted improvements. ● Design and prototype “future state” process maps that propose innovative solutions to improve business processes. <p>Earn three Salesforce Trailheads: <i>Business Process Mapping, Diagramming Essentials, and Process Mapping for Business Analysts.</i></p>	<p>Propose a solution with a detailed process map.</p>
<p>Module 6: Automating your Organization’s Processes</p> <ul style="list-style-type: none"> ● Explore the history and context of Salesforce automation tools, focusing on why Salesforce Flows have become the primary tool for automating business processes. ● Delve into how Salesforce Flows revolutionize automation by enabling more complex, customizable, and efficient workflows and why this is a game-changer for Salesforce Administrators. ● Assess other automation methods within Salesforce, such as approval processes, and understand when and how to use them in conjunction with Flows to enhance business processes. 	<p>Scope an automation solution.</p>

<ul style="list-style-type: none"> ● Identify scenarios where coding with Apex is necessary for automation and understand how it complements declarative automation tools like Flows, allowing Salesforce Administrators to extend functionality when needed. ● Diagnose and resolve issues in Salesforce workflows, Process Builder, and Flow automations for optimal performance. <p>Earn two Salesforce Trailheads: <i>Lightning Experience Customization and Workflow Rules Basics.</i></p>	
<p>Module 7: Boosting Productivity and Collaboration in your Organization</p> <ul style="list-style-type: none"> ● Develop the ability to review and improve processes to make work more efficient and collaborative. ● Discover and suggest useful AppExchange apps that can help meet business needs and streamline workflows. ● Build custom apps for specific business tasks using both simple and advanced Salesforce features. ● Identify and fix issues that affect performance and usability, making sure Salesforce works well for everyone involved. <p>Earn three Salesforce Trailheads: <i>Lightning Experience Productivity, Salesforce Einstein Basics, and Data Cloud.</i></p>	<p>Design an app for a specific business need.</p>
<p>Module 8: Managing Cases, User Requests, and Tickets for your Organization</p> <ul style="list-style-type: none"> ● Develop the ability to prioritize tasks that address urgent needs while driving sustainable success over time. ● Organize and categorize cases effectively to ensure they are routed to the appropriate teams, enhancing efficiency and focus. ● Evaluate key metrics within case management processes, providing actionable insights to improve service quality and outcomes. 	<p>Set up a Flow to manage customer service inquiries.</p>

<ul style="list-style-type: none"> ● Create flexible and scalable case management systems that can adapt to the organization’s evolving needs and growth. <p>Earn four Salesforce Trailheads: <i>Scrum and Kanban for Salesforce, Service Cloud for Lightning Experience, Leads and Opportunities, and Contacts and Accounts.</i></p>	
<p>Module 9: Managing Your Workload</p> <ul style="list-style-type: none"> ● Analyze and compare strategic and tactical Salesforce requests to effectively meet the organization's evolving needs. ● Implement strategic product management approaches for Salesforce projects, including gathering requirements, handling support tickets, and prioritizing tasks based on impact. ● Leverage a prioritization matrix to align Salesforce projects and backlogs with overarching business objectives and end-user needs. ● Manage timelines and resources effectively to deliver Salesforce solutions on time while continuously improving and keeping stakeholders happy. <p>Earn one Salesforce Trailhead: <i>AppExchange Basics.</i></p>	<p>Develop a prioritization and execution strategy for Salesforce projects.</p>
<p>Module 10: Communicating like a Salesforce Administrator</p> <ul style="list-style-type: none"> ● Cultivate a strong point of view (POV) as a Salesforce Administrator and learn how to confidently present it to influence decisions and demonstrate your expertise. ● Apply advanced communication techniques to guide discussions toward outcomes that benefit all stakeholders, using active listening and thoughtful questioning to uncover needs and opportunities. ● Use your POV to craft and deliver compelling proposals that clearly express your perspectives and highlight the value and impact of your Salesforce solutions. 	<p>Share your point of view on a proposed solution.</p>

<ul style="list-style-type: none"> • Develop, present, and propose compelling Salesforce solutions to demonstrate your expertise and enhance stakeholder understanding. 	
Complete a Salesforce Administrator Practice Exam	

Delivery and Schedule

Entirely online, on-demand learning with weekly 2-hour live/online interactive group sessions led by mentors with subject matter experts. Ziplines Education uses Canvas as the learning management system (LMS).

Complete online content created by industry experts featuring scenario-based learning and best practices for using AI tools	4-6 hours	Released every Friday
Complete a hands-on project to apply skills.	1-2 hours	Due two weeks after the module release
Attend a live session to learn from an industry expert alongside your classmates (optional)	2 hours	Weekday evening
Get extra support by messaging your classmates on Slack or reaching out to the Learner Success team.	Ongoing	Ongoing

Technical Requirements

- A computer to access the LMS, live/online sessions, and Slack workspace
- A microphone (built-in, headphones, or headset)
- A webcam (built-in or USB plug-in) (optional but recommended)
- Internet connection (broadband wired or wireless; 3G, 4G, or 5G/LTE)

Assessment

A certificate of completion will be issued when you:

- Achieve at least 70% on the module assessments
- Complete all of the playbook assignments
- Complete all assigned Trailhead modules

Hours and Articulation

Each of the ten modules requires 10 hours, which includes on-demand learning, a 2-hour live session, and playbook assignment completion.

Total Module Contact Hours: 100 hours

In addition, learners will have access to an optional 4-week long Salesforce Administration Certification preparation program that includes live sessions with subject matter experts, hands-on activities, practice tests, study guides, and more.

Total Prep Work Contact Hours: 40 hours