Salesforce* Integration and Training Approach

Schedule

November	System programing / upgrades / integration (Salesforce, PayPal, Square, MailChimp)
December	Training preparation (sandbox, class sessions, exercises, materials, classroom logistics)
January	Training sessions
February	Review
March	Refresher session

Goal: Salesforce Training

The training will be specialized toward the customized usage of Salesforce at Project Onward. Three days of training will be offered (i.e. four classes), each being a prerequisite to the others. (Lower-numbered levels are considered prerequisite training for higher numbers. Example: Personnel considering *#2 Information Entry and Maintenance* training must first complete *#1 Information Query*):

1. *Information Query* - **Half-day** (3 hours plus half-hour break) - Personnel who use Salesforce as a source of information. Training will focus on access to information through customized reports and through online queries using Salesforce screens.
2. *Information Entry* and Maintenance - **Full-day** (6 hours plus two half-hour breaks and one-hour lunch break) - Entry and update of information relating to Contacts and Accounts (Households and Organizations); Opportunities (Donations, Grants, Art Sales and Commissions). Focus will include data quality and cleanliness.
3. *Administration* - **Full-day** (6 hours plus two half-hour breaks and one-hour lunch break) - User administration, Data cleansing, Bulk-loading of data, data backup, etc. System and Reports customization.
4. *Targeted session* - **Half-day** (3 hours plus half-hour break) - Based on feedback from the trainees in the earlier sessions, the final session will target specific issues and concerns. Note: depending on the defined class agenda, *#3 Administration* may or may not be considered a prerequisite.
5. *Refresher session* – **Half-day** (3 hours plus half hour break) – no cost to Project Onward.

Trainees will be provided a Syllabus and a Training Manual.

Hands-on training will be conducted in a classroom setting with attendees using workstations (i.e. computers with web browsers and internet access). The training sessions will include Salesforce orientation videos, classroom instruction and workstation exercises, which the trainees will complete in the presence of the instructor. Each session will include time for questions and feedback.

Each classroom session duration will be 3 hours (including 30 minute workstation exercise). The instructor will be available for an extra hour, after each session, to work with individuals with specific questions or issues.