

"Salesforce KPI & SLA Dashboard Creation"

Course Introduction

This course is designed to equip participants with practical skills to transform raw Salesforce data into meaningful business insights. The course covers the end-to-end process of building reports and dashboards for KPI tracking and SLA monitoring, starting from understanding the data model and progressing to advanced reporting techniques, data analysis, and visualization. Through hands-on exercises and a real-world capstone use case, participants will learn how to design effective dashboards, monitor performance metrics, and deliver actionable insights to stakeholders, enabling better decision-making and operational efficiency.

Day 1: Foundations & Report Building

Module 1: Foundations of Salesforce Reporting

- Overview of Salesforce Data Model
 - Standard Objects, Fields, Relationships
 - Creating a Dummy Project Dataset (Records setup)
 - Introduction to Reports vs Dashboards
 - Understanding KPIs and Business Metrics
 - When to Use Reports for KPI Tracking
-

Module 2: Report Creation – Basics

- Creating Tabular Reports
 - Understanding Report Builder Interface
 - Applying Filters and Basic Customization
 - Sorting and Formatting Data
-

Module 3: Report Creation – Advanced

- Summary, Matrix, and Joined Reports
 - Grouping Data for Insights
 - Creating:
 - Formula Fields
 - Bucket Fields
 - Summary Formulas
-

Hands-On Lab (Day 1)

- Build reports from scratch using dummy dataset
 - Create KPI-based reports
 - Apply filters, grouping, and formulas
-

Day 2: SLA Reporting & Dashboards

Module 4: SLA Monitoring Using Reports

- Understanding SLA Metrics
 - Designing SLA Tracking Reports
 - Working with Date & Time Fields
 - Measuring:
 - Response Time
 - Resolution Time
 - Building Exception Reports
-

Module 5: Dashboard Fundamentals

- Introduction to Dashboard Components
- Chart Types for KPIs:
 - Bar, Line, Donut, Gauge
- Creating Dashboard Components
- Dynamic vs Static Dashboards

Module 6: Building KPI & SLA Dashboards

- Designing KPI Monitoring Dashboards
 - Creating End-to-End Dashboard
 - Visualizing Key Metrics Effectively
 - Setting Dashboard Refresh Schedules
 - Sharing Dashboards with Stakeholders
-

Hands-On Lab (Day 2)

- Build SLA tracking reports
 - Create KPI dashboard with multiple components
 - Configure dashboard settings & sharing
-

Day 3: Advanced Use Cases & Best Practices

Module 7: Advanced Reporting & Optimization

- Report Performance Optimization
 - Cross-Object Reporting Considerations
 - Data Accuracy & Validation for KPIs
-

Module 8: Dashboard Design Best Practices

- Layout & User Experience Principles
 - Choosing the Right Visualizations
 - Avoiding Common Dashboard Mistakes
-

Module 9: Real-World Use Case (Capstone)

- End-to-End Scenario:
 - Define KPIs
 - Build Reports
 - Design Dashboard
 - SLA + KPI Monitoring Use Case Implementation
-

Final Hands-On Project

- Build a complete:
 - KPI Reporting Suite
 - SLA Monitoring Dashboard
- Present dashboard (optional, if classroom setting)