# Salesforce: Strategic Customer Management and Business Performance

## Lecturer: Ivan Renesto

## 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 understand Salesforce solutions, and use Salesforce CRM, fostering innovation and driving efficiency in organizational processes.

## 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. It will not be visible beforehand).
You can only cancel your registration only through the Diary and no later than the course registration deadline. No other means 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: **Exclusion List**

## Duration

16 hours

## Teaching mode

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

## Calendar

| Lecture | Date | Time | Room |
|---------|------|------|------|
| 1 | Thu 26/03/2026 | 18.15 - 19.45 | N30 (L. Del Vecchio) |
| 2 | Wed 01/04/2026 | 18.15 - 19.45 | N30 (L. Del Vecchio) |
| 3 | Fri 03/04/2026 | 14.45 - 16.15 | N38 (L. Del Vecchio) |
| 4 | Wed 15/04/2026 | 18.15 - 19.45 | N30 (L. Del Vecchio) |
| 5 | Fri 17/04/2026 | 14.45 - 16.15 | N38 (L. Del Vecchio) |

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| 6 | Mon 20/04/2026 | 18.15 - 19.45 | N30 (L. Del Vecchio) |
| 7 | Tue 28/04/2026 | 18.15 - 19.45 | N30 (L. Del Vecchio) |
| 8 | Thu 30/04/2026 | 18.15 - 19.45 | N30 (L. Del Vecchio) |

## Syllabus of the course

| Lecture | Topics |
|---|---|
| 1 | **CRM Fundamentals and Salesforce Platform Introduction** |

- CRM drives customer acquisition, retention, and long-term loyalty
- Four CRM forms: Strategic (culture), Operational (automation), Analytical (insights), Collaborative (alignment)
- Customer journey mapping tracks touchpoints and measures relationship quality
- Salesforce Lightning Experience provides a unified, modern CRM interface

### Use Cases

- Setting up your Salesforce Environment
- Understanding Customer Data Structure

| 2 | **Lead Management and Sales Pipeline** |

- Sales Force Automation (SFA) benefits and components
- Lead lifecycle: capture, qualification, nurturing, conversion
- Lead scoring and prioritization strategies
- Sales pipeline stages and opportunity management

### Use Cases

- Capturing and Managing Leads
- Lead Qualification and Conversion
- Building your Sales Pipeline

| Lecture | Topics |
|:---:|:---|
| 3 | ***Account and Contact Relationship Management*** |
| | - Account hierarchy and parent-child relationships |
| | - Contact roles and influence mapping |
| | - 360-degree customer view concept |
| | - Relationship intelligence and engagement tracking |
| | ***Use Cases*** |
| | - Building account hierarchies |
| | - Managing multiple stakeholders |
| | - Tracking customer engagement history |
| 4 | ***Product Catalog, Pricing, and Quote Management*** |
| | - Product catalog structure and management |
| | - Price books: standard vs. custom pricing |
| | - CPQ (Configure-Price-Quote) fundamentals |
| | - Quote generation and approval workflows |
| | ***Use Cases*** |
| | - Building a Product Catalog |
| | - Creating custom price books |
| | - *Generating professional quotes* |
| 5 | ***Marketing Campaigns and Lead Generation*** |
| | - Marketing automation benefits and ROI |
| | - Campaign planning and execution |
| | - Customer segmentation and targeting |
| | - Multi-channel campaign coordination |
| | - Campaign effectiveness metrics |
| | ***Use Cases*** |
| | - Creating and managing Campaigns |
| | - Web-to-Lead Integration |
| | - Measuring Campaign Performance |

| Lecture | Topics |
|---|---|
| 6 | **Customer Service and Case Management** |
| | - Service automation benefits and use cases |
| | - Case lifecycle management |
| | - Omnichannel support strategy |
| | - Service level agreements (SLAs) and escalations |
| | - Knowledge base and self-service portals |
| | **Use Cases** |
| | - Managing Customer Cases |
| | - Automate Case Routing and Escalation |
| | - Building a Knowledge Base |
| 7 | **Reports, Dashboards, and Data-Driven Decisions** |
| | - Analytical CRM and business intelligence |
| | - Report types: Tabular, Summary, Matrix |
| | - Dashboard design principles |
| | - KPI selection and metric definition |
| | - Data visualization best practices |
| | **Use Cases** |
| | - Creating Custom Reports |
| | - Building Executive Dashboards |
| | - Sales Performance Analysis |
| 8 | **End-to-End CRM Implementation** |
| | - Marketing and Lead Generation |
| | - Sales Process Execution |
| | - Customer Onboarding and Service |
| | - Analysis and Optimization |

## Software used

During the course, Salesforce CRM solution will be used. Students will be asked to register a **Trailblazer Account** (in example using the @studbocconi.it email address) for accessing a Learning Environment: [Salesforce Trailhead](), and then to register a **CRM Environment Account** for using [Salesforce Free CRM Suite]().

## 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.