

Salesforce Business Analyst Training Curriculum

Module 1: Introduction to Salesforce Business Analysis

- Role of a Salesforce Business Analyst vs General BA
- Core responsibilities and deliverables
- Importance of domain knowledge (Finance, Healthcare, Retail, etc.)
- Introduction to Salesforce ecosystem & platform

Module 2: Business Analysis Foundations

- SDLC Models (Agile, Waterfall, Hybrid)
- Agile for Salesforce Projects (Scrum Framework)
- Requirements gathering techniques: Interviews, workshops, brainstorming, document analysis
- Types of requirements: Business, Functional, Non-Functional
- Writing effective User Stories (INVEST model)
- Acceptance Criteria using Gherkin syntax
- Business Requirement Document (BRD) & Functional Requirement Document (FRD)

Module 3: Salesforce Fundamentals for Business Analysts

- Salesforce architecture overview (Sales Cloud, Service Cloud, etc.)
- Object-Oriented Data Model: Standard vs Custom Objects
- Fields, Relationships, Validation Rules
- Process Automation tools: Flow, Approval Processes, Workflow Rules
- Reports, Dashboards, List Views
- AppExchange basics & integrations overview

Module 4: Salesforce Security Model

- Overview of Salesforce Security Model
- Organization-Wide Defaults (OWD)
- Role Hierarchies
- Profiles vs Permission Sets
- Sharing Rules
- Field-Level and Record-Level Security
- Data visibility for different user personas
- Real-world scenarios: Role-based access in regulated industries (Finance, Healthcare)

Module 5: Tools & Techniques for Business Analysts

- Diagramming: Lucidchart, Draw.io (for BPMN)
- Wireframing Tools: Figma, Balsamiq

- Documentation: Confluence, Word templates
- User Story management: Jira, Azure DevOps
- Analysis techniques: SWOT, GAP Analysis, Stakeholder Matrix

Module 6: Business Process Mapping

- As-Is vs To-Be process flows
- Identifying process inefficiencies
- Salesforce Fit-Gap analysis
- Creating: Process Diagrams (BPMN/Flowcharts), Use Case Diagrams, ERD (Entity Relationship Diagrams)

Module 7: Stakeholder & Communication Management

- Stakeholder Identification & Prioritization
- Communication strategies: Reports, demos, emails
- Running effective meetings and workshops
- Conflict handling and expectation setting
- Storytelling and demoing business value

Module 8: Real-World Scenarios & Industry Use Cases

- Retail: Order management, loyalty programs
- Healthcare: Case tracking, HIPAA-aligned access
- Banking: Lead-to-loan journey, KYC automation
- Education: Admissions, student lifecycle in Salesforce
- Nonprofit: Fundraising, volunteer management (NPSP)

Module 9: Testing & UAT from a BA's Perspective

- Understanding test plans & test cases
- Writing UAT scenarios and scripts
- Coordinating UAT sessions with stakeholders
- Logging bugs and enhancements

Module 10: Resume, Certification & Interview Preparation

- Resume best practices for Salesforce BAs
- Creating a project portfolio (even as a fresher)
- Top 20 interview questions with answers
- How to demonstrate value as a BA during interviews
- Certification path: Salesforce Business Analyst Certification, Salesforce Administrator (recommended baseline)