Salesforce Service Cloud: Agent Basics Training Course

Professional Development Training Course Outline

Category	Customer Service and Customer Experience	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Salesforce Service Cloud has emerged as the leading customer service platform, empowering businesses to deliver exceptional support experiences. Salesforce Service Cloud: Agent Basics Training Course equips learners with the essential tools and knowledge to navigate Service Cloud efficiently, streamline case management, and enhance customer satisfaction. Through hands-on exercises, real-world scenarios, and strategic insights, participants gain the expertise to manage service requests, leverage automation tools, and adopt best practices for a modern customer service environment.

This training focuses on enabling agents to maximize productivity, improve customer engagement, and drive operational efficiency. By understanding Service Cloud features such as case management, knowledge base utilization, and workflow automation, agents can respond faster, resolve issues effectively, and contribute to long-term business success. The course emphasizes practical application, making it suitable for both newcomers to Salesforce and professionals seeking to enhance their service capabilities in a dynamic digital landscape.

Programme Curriculum

Salesforce Service Cloud: Agent Basics Training Course

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Course Duration

5 days

Course Objectives

By the end of this course, participants will be able to:

1. Navigate Salesforce Service Cloud interface with ease and efficiency.
2. Understand and apply case management best practices.
3. Utilize the knowledge base for faster issue resolution.
4. Leverage automation tools to optimize workflows.
5. Manage customer interactions using Omnichannel routing.
6. Enhance customer engagement through personalized service.
7. Track and monitor performance using Service Cloud analytics.
8. Collaborate effectively within team and department structures.
9. Understand service console features for agent productivity.
10. Implement escalation and SLA management strategies.
11. Apply real-world problem-solving skills in live scenarios.
12. Integrate Service Cloud with other Salesforce products.
13. Adopt digital-first customer support practices for business growth.

Target Audience

1. Customer Service Representatives
2. Support Agents
3. Service Desk Analysts
4. Salesforce Administrators
5. Customer Experience Managers
6. IT Support Professionals
7. Call Center Staff
8. Business Analysts in Customer Service

Course Modules

Module 1: Introduction to Salesforce Service Cloud

- Overview of Salesforce ecosystem
- Service Cloud features and benefits
- Navigation and UI essentials
- Role of Service Cloud in customer service
- **Case Study:** How a retail company improved support response times

Module 2: Case Management Essentials

- Creating and managing cases
- Case assignment rules and queues
- Prioritization and escalation
- Case lifecycle overview
- **Case Study:** Telecom company reducing case backlog

Module 3: Knowledge Base Utilization

- Creating and searching knowledge articles
- Linking articles to cases
- Best practices for article management
- Knowledge article versioning
- **Case Study:** Tech startup leveraging knowledge articles for faster resolutions

Module 4: Automation and Workflow Management

- Setting up workflows and process automation
- Using macros and quick actions
- Case auto-assignment rules
- Automating repetitive tasks
- **Case Study:** Financial services firm automating routine inquiries

Module 5: Omnichannel and Interaction Management

- Introduction to Omnichannel routing
- Handling multiple communication channels
- Queue management strategies
- Agent presence and availability
- **Case Study:** Global e-commerce brand streamlining multichannel support

Module 6: Service Console Mastery

- Customizing the console for agent productivity
- Tabs, highlights, and utility bar usage
- Integrating dashboards and reports
- Real-time case updates and collaboration
- **Case Study:** Healthcare provider improving agent efficiency with console customization

Module 7: Analytics and Performance Tracking

- Tracking KPIs and metrics
- Creating dashboards and reports
- Monitoring SLA compliance
- Using analytics to drive improvements
- **Case Study:** Insurance company using Service Cloud analytics to reduce resolution time

Module 8: Best Practices and Real-World Applications

- Handling escalations effectively
- Integrating Service Cloud with other Salesforce products

- Digital-first service strategies
- Continuous learning and agent upskilling
- **Case Study:** Global logistics company transforming service operations

Training Methodology

This course employs a participatory and hands-on approach to ensure practical learning, including:

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.
- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com