Salesforce for M&E Case Management Training Course

Professional Development Training Course Outline

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

Course Introduction

In today’s data-driven development landscape, Salesforce for M&E Case Management offers a transformative solution for managing monitoring and evaluation workflows, program performance, and stakeholder engagement. Salesforce for M&E Case Management Training Course equips participants with practical skills to streamline case tracking, reporting, and analytics, leveraging Salesforce’s powerful CRM capabilities to enhance data integrity, real-time feedback, and decision-making efficiency. By integrating automation, dashboards, and cloud-based solutions, participants will learn how to optimize case management processes while ensuring compliance, accountability, and measurable outcomes across complex development programs.

This intensive training bridges the gap between M&E theory and practical Salesforce application, emphasizing hands-on exercises, real-world case studies, and scenario-based learning. Participants will explore customizable Salesforce modules for case registration, workflow automation, and reporting, gaining expertise in data visualization, performance monitoring, and strategic insights. By the end of the course, participants will be able to design, implement, and manage efficient case management systems, transforming program operations into actionable, evidence-based interventions that drive results.

Programme Curriculum

Salesforce for M&E Case Management Training Course

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5 days

Course Objectives

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

1. Implement Salesforce for effective M&E case management.
2. Customize case tracking workflows for program-specific needs.
3. Utilize real-time dashboards for actionable insights.
4. Integrate data collection and automation for improved efficiency.
5. Apply advanced reporting techniques for performance evaluation.
6. Manage stakeholder engagement and communication through Salesforce.
7. Ensure data quality, compliance, and security in M&E systems.
8. Leverage analytics to inform decision-making and program adjustments.
9. Conduct case studies and scenario-based problem solving.
10. Optimize resource allocation and workload management using Salesforce.
11. Develop custom alerts, notifications, and reminders for case follow-up.
12. Strengthen collaboration across teams and multi-level reporting structures.
13. Monitor program impact and outcome indicators efficiently.

Target Audience

1. M&E Officers and Managers
2. Program Coordinators and Supervisors
3. Data Analysts and Reporting Specialists
4. Project Managers in development programs
5. Salesforce Administrators supporting M&E functions
6. Monitoring and Evaluation Consultants
7. Program Implementers in NGOs, CSOs, or Government Agencies
8. Decision-makers seeking **data-driven program improvements**

Course Modules

Module 1: Introduction to Salesforce for M&E Case Management

- Overview of Salesforce CRM in M&E contexts
- Understanding **case management concepts**
- Salesforce architecture for **program tracking**

- Key benefits for **data-driven decision-making**
- Case Study: NGO implementing Salesforce for child protection cases

Module 2: Salesforce Setup and Configuration

- Creating custom objects and fields for cases
- Setting up **user roles and permissions**
- Defining **case types and workflow rules**
- Configuring **page layouts and record types**
- Case Study: Government health program Salesforce setup

Module 3: Case Registration and Workflow Automation

- Logging and categorizing cases efficiently
- Automating case assignment and escalation
- Using **process builder and flow automation**
- Setting up alerts, reminders, and notifications
- Case Study: Automated follow-up for community health cases

Module 4: Data Collection and Management

- Integrating Salesforce with **data collection tools**
- Managing structured and unstructured case data
- Ensuring **data accuracy and validation rules**
- Handling bulk uploads and data imports
- Case Study: Multi-partner program data harmonization

Module 5: Reporting and Dashboards

- Creating **custom reports and charts**
- Real-time dashboards for monitoring cases
- Tracking key **performance indicators (KPIs)**
- Filtering and segmenting data for insights
- Case Study: Dashboard visualization for nutrition program outcomes

Module 6: Analytics and Insights

- Using Salesforce analytics for **program evaluation**
- Predictive analytics for case trends and risks
- Generating **actionable recommendations**
- Leveraging historical data for **impact assessment**
- Case Study: Predictive insights for education intervention cases

Module 7: Stakeholder Engagement and Collaboration

- Managing communications through Salesforce Chatter and notifications
- Assigning tasks and follow-ups across teams
- Sharing reports securely with partners and donors
- Enhancing multi-level reporting and feedback loops
- Case Study: Cross-agency collaboration in disaster response programs

Module 8: Compliance, Security, and Best Practices

- Ensuring **data protection and privacy** standards
- Audit trails and regulatory compliance
- Best practices for maintaining **case integrity**
- Continuous improvement of M&E workflows
- Case Study: GDPR-compliant case management system

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
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