

salesforce

THE CUSTOMER SUCCESS PLATFORM

# Salesforce Trailhead

How two teams converged to blaze a new trail

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## What are you going to learn?

- Collaboration – Why collaborative, agile, and iterative are so much more than buzzwords
- Content – How the DITA promise of reuse did and didn't work for us
- Marketing – What marketing tools and techniques have helped us drive engagement
- Success – How our joint efforts allowed us to connect with our customers like never before
- Repeat – Where we hope to go from here

# What were we trying to do?

Focus on learning

Consolidate learning content  
Improve upon our already popular workbooks

Blaze a clear path

Provide a clear indication of where to start or go next

Create a feedback loop

Interact with users  
Track completion rates



# Goal

## Reinvent the way customers learn Salesforce

The screenshot shows the Salesforce Trailhead website interface. At the top, there is a navigation bar with the Salesforce logo, the word "developers", and links for PLATFORM, LIBRARY, TOOLS, and COMMUNITY. A search bar and "Login" and "Sign Up" buttons are also present. Below the navigation bar, there are links for "Trailhead beta", "Modules", "FAQ", and "Forum". The main content area features a heading "Learn how to use Salesforce with Trailhead" and a sub-heading "New to Salesforce? Or just want to dive deeper? Choose the trail that's right for you." A horizontal arrow with three numbered steps (1, 2, 3) points from left to right. Below the arrow are three colored boxes representing different learning paths:

- Step 1: Getting Started with the Force.com Platform**  
Learn fundamentals such as mapping your data model, managing data, & customizing the UI. Plus, go mobile with Salesforce!!
- Step 2: Intro to Visual App Development**  
Practice automating workflows & approvals, building reports & dashboards, setting up Chatter, & deploying your apps.
- Step 3: Intro to Programmatic App Development**  
Experiment with Apex, a Java-like language, & Visualforce, similar to HTML. Then dive into integration & lifecycle management.

At the bottom of the screenshot, there are two links: "★ More trails coming soon! [Suggest a topic.](#)" and "🗨️ Have a question? [Visit the FAQ.](#)"

But...

We had to do it by Dreamforce (in 10 weeks!)

# Collaboration

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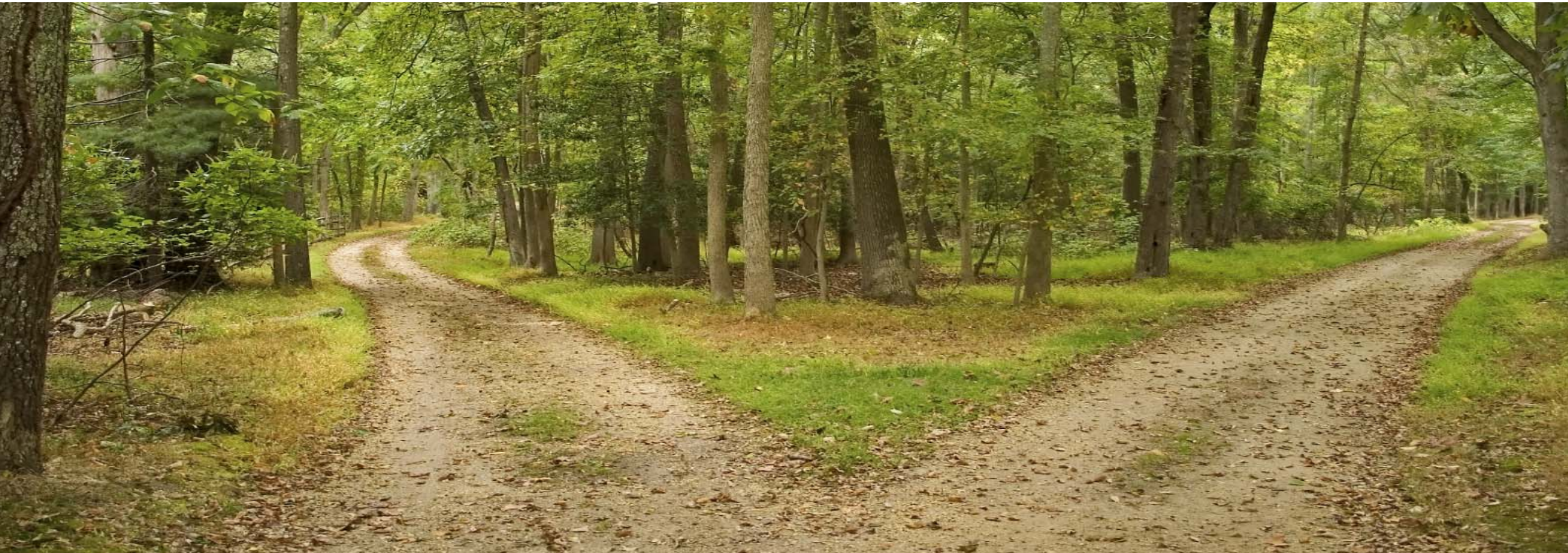


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So two teams converged

**Documentation Team**

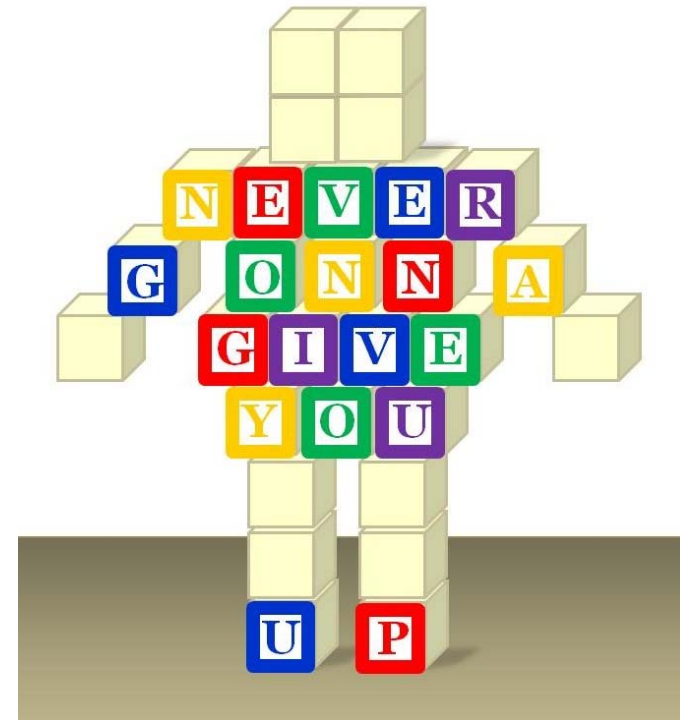
**Developer Marketing**



# Technology

Fortunately we had experience building things together

- Developer documentation portal project used same technology
- Teams knew each other from that project
- Working proof-of-concept app for hands-on challenges
- Platform with activity tracking and marketing automation
- Co-location in new office right before we started





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# Process

V2MOM is...

Our original management process that drives alignment and accountability at all levels

**Vision:** What do you want to do this year?

**Values:** What is most important to you?

**Methods:** What actions must you take to get the job done?

**Obstacles:** What might stand in your way?

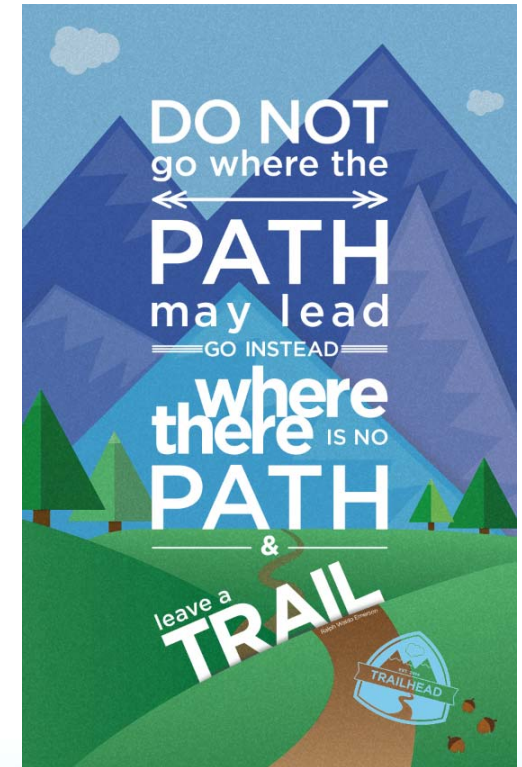
**Measures:** How will you know when you've been successful?



# Process

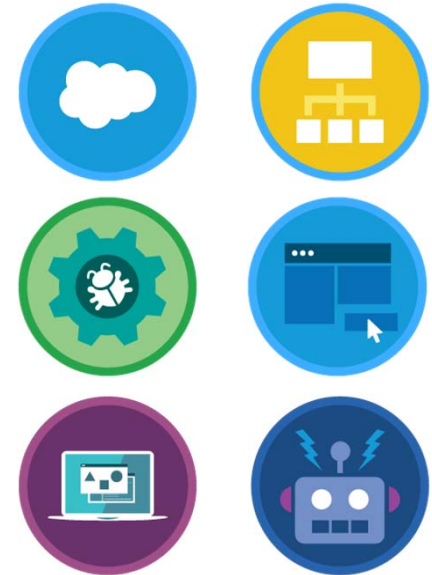
Goal: Reinvent the way customers learn Salesforce

- **Trust**  
Content needs to be correct, authoritative, and up-to-date
- **Scale**  
Optimized for content production, consumption, and maintenance
- **Delight**  
Addictive, engaging (fun!) user experience that incents users to continue learning and bolsters the community



# Process

- **Learning paths and incentives**  
Trails, points, badges
- **Design and implementation**  
UI and app
- **Learning content**  
Learning objectives and topics
- **Assessments**  
Interactive challenges
- **Marketing**  
Campaigns, data, community



# Culture

## Platform Doc and Developer Marketing

- Shared vision
- V2MOM measure to drive developer adoption
- Complementary core competencies
- Work environment
- Corporate culture



# Culture

## Platform Doc and Developer Marketing

- Very different working styles and timeframes
- Different ideas about ideal content



# Content

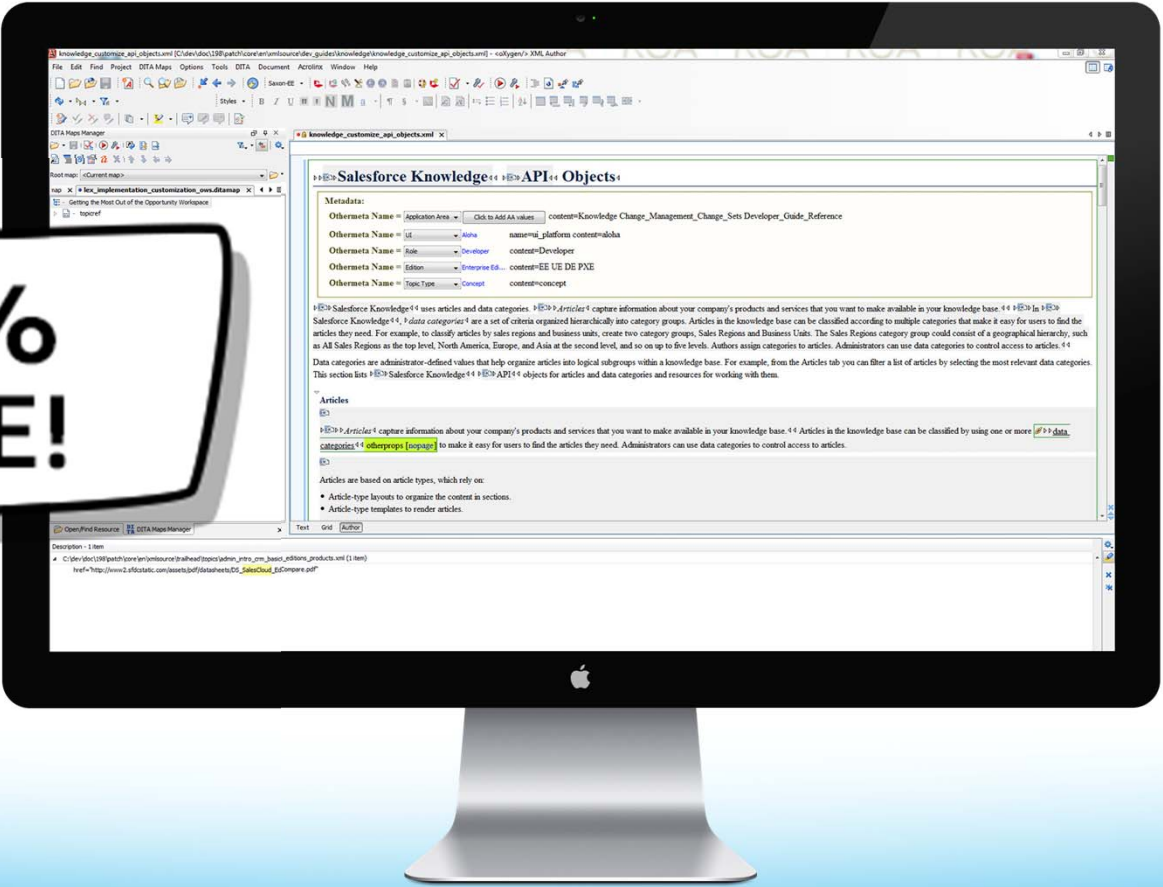
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# New deliverable request?

No problem, we've got DITA

**100% REUSE!**



## Except...

Our existing content wasn't always up to the task

What task?

“Reinvent the way customers learn Salesforce.”

What were the obstacles?

- Voice and tone
- Legacy content that wasn't adequately structured
- New types of topics, like Learning Objectives
- Ephemeral content



# Not-so-technical technical documentation

## Beyond “Aloha”

- Negotiation over ideal form and level of detail
- Increased focus on audience and role
- Jokes are encouraged!

“Although sforce.one sounds like the private jet Marc Benioff flies around in, it’s actually a utility object that provides a number of useful functions you can use in your own JavaScript code.”

- But they may be lost in translation
- April Fools!

When we say	We mean this	Not this
Record	An item you are tracking in your database; if your data is like a spreadsheet, then a record is a row on the spreadsheet	This round thing that plays music #vinyl
Field	A place where you store a value, like a name or address; using our spreadsheet example, a field would be a column on the spreadsheet	A green meadow with flowers and grass and hopping bunnies
Object	A table in the database; in that spreadsheet example, an object is a tab on the spreadsheet	Something unidentified in the sky, with green creatures inside
	Short for “organization,” the place where all your data, configuration, and customization lives. You and your users log in to access it. You also hear this called “your instance of Salesforce”	Short for organ, meaning your heart, liver, kidneys, or possibly a big musical instrument
	Configuration tools and programming languages and APIs for Salesforce, including Apex and Visualforce	Something related to a galaxy far, far away
	Objects, permissions, and functionality to support a...	A thing you download onto your phone



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## What makes Trailhead special?

- Role-based learning paths
- “Bite-sized” units of information
- Explicit learning objectives
- Interactive challenges that test those objectives
- See for yourself at [developer.salesforce.com/trailhead](https://developer.salesforce.com/trailhead)

Check Challenge

# Marketing

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## What was the marketing plan?

### Brand

Bake fun into the content and tone

Play with trailhead metaphor

Emphasize learning

### Gamification

Motivate via points and badges

Highlight accomplishments on community profiles

Celebrate success on social

### Marketing automation

Track and analyze user behavior

Inform content roadmap and maintenance

Segment audience for personalized content



# Soft launch at Dreamforce '14

Announced during the Developer Keynote



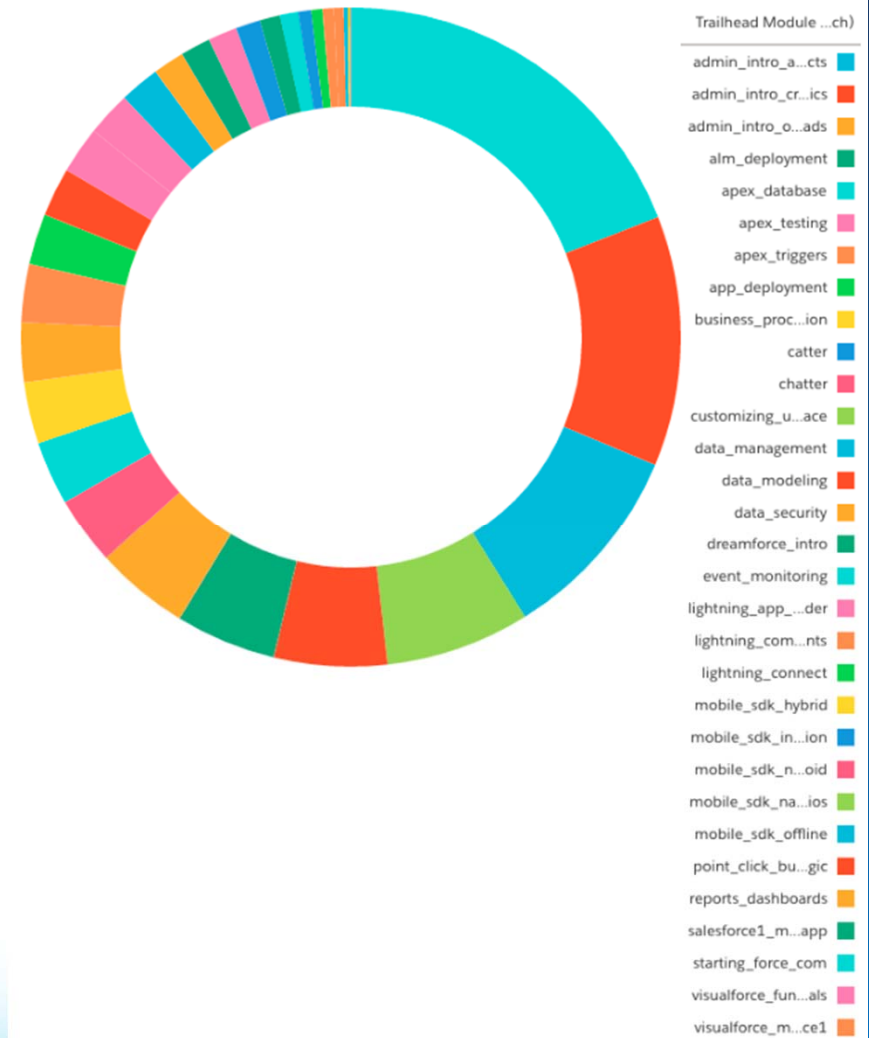
# Success

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# How do we measure success?

## Metrics

- # of learning path page views
- # of users who have completed at least one challenge
- # of challenges completed
- % new developers who become active



## What was the community response?

In 2 weeks:

- 1,500+ social posts
- 20+ community-authored posts



**Mary Pustejovsky**  
@mpusto

 Follow

Trailhead from @Salesforce is revolutionary. Learning paths for anyone to learn Salesforce for FREE.

[developer.salesforce.com/trailhead...](https://developer.salesforce.com/trailhead...)

10:35 AM - 17 Oct 2014

  8  6



**Jesse Altman**  
@jessealtman

 Follow

First time playing around with Trailhead. Just got 500 points! This is addicting and a great way to learn!

[developer.salesforce.com/trailhead](https://developer.salesforce.com/trailhead)

10:03 AM - 20 Nov 2014

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# More Marketing

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# Marketing automation

## Intelligence

- Track and incentivize user activity, not just page views
- Reactivate users via targeted email drip program
- Segment users to guide them down the correct learning path
- Announce new content



Fun & easy guided tutorials to help you build amazing things

Choose your trail:

Beginner Admin


Go team clicks!

Beginner Developer

Go team code!

Or dive right into a specific topic

[Browse all topics →](#)

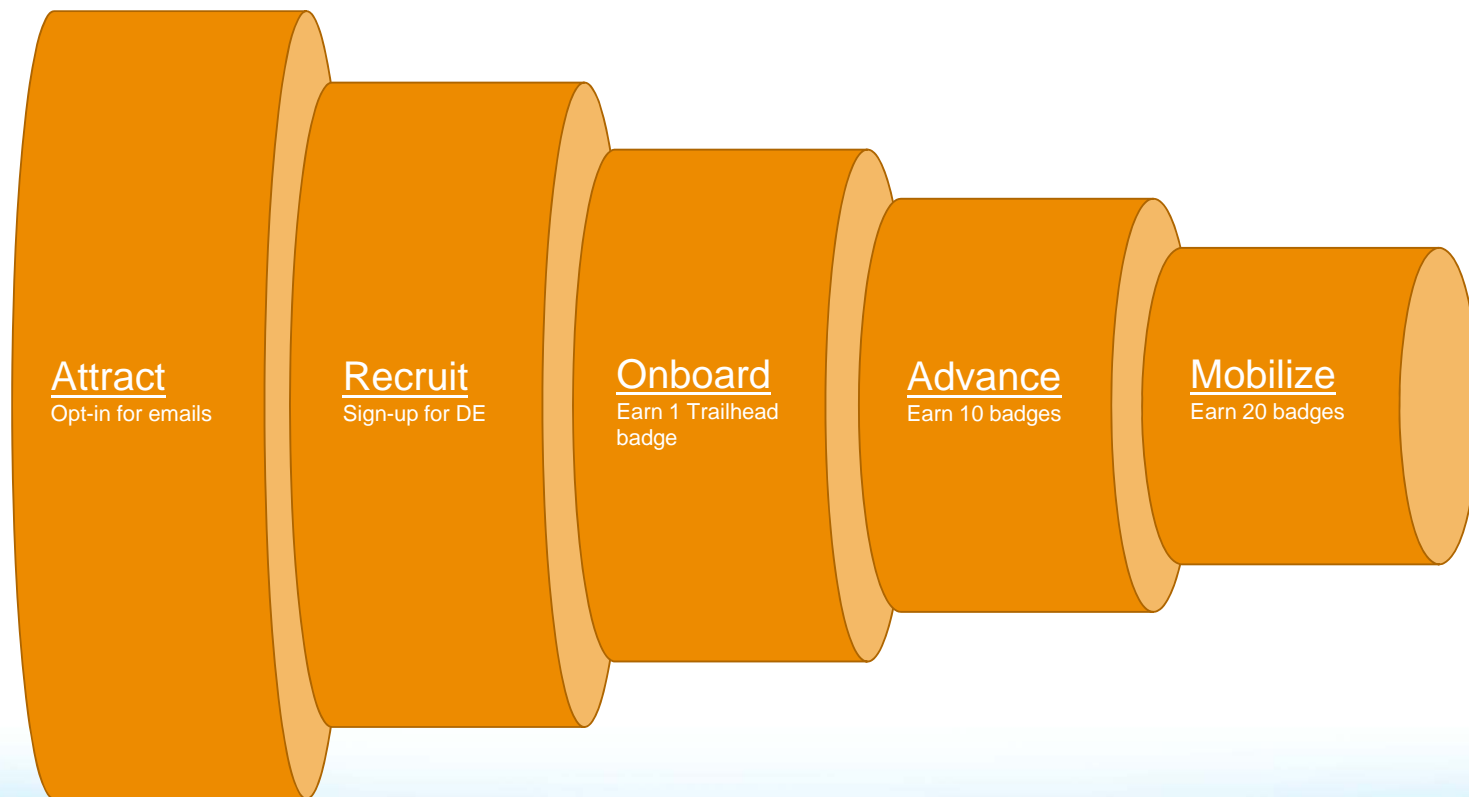




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# Marketing automation

## Action-based funnel



# Events

130 + webinars, global meetups, workshops, internal trainings, and more



Terrific turnout



Customer enthusiasm

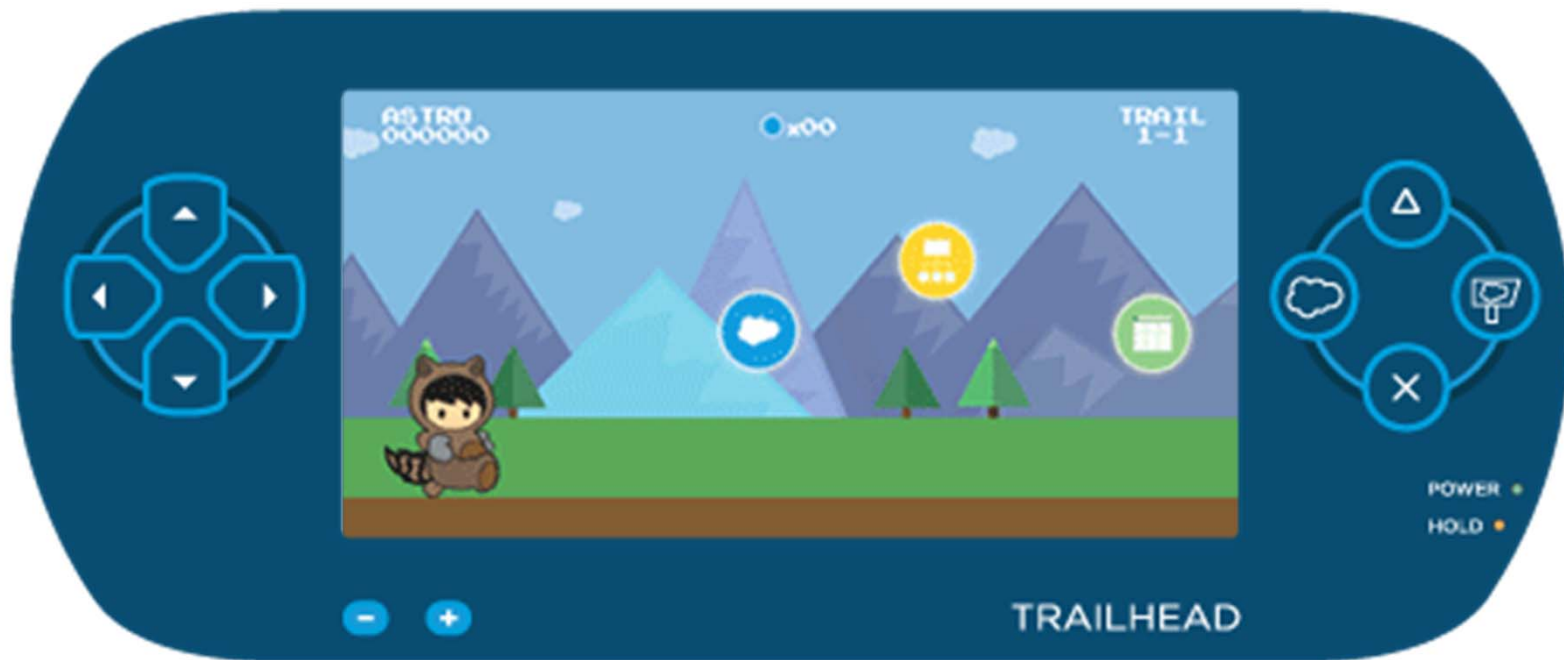


Hands-on interaction



Fun and prizes

And even more fun!



# More Content

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## Growing pains

From a one-off project to a mainstream deliverable

### “Coming soon” and MCQs

Tension around timeframe for enhancements versus regularly scheduled release doc

Is the content stream yellow or red this week?

Multiple-choice questions for challenges

### New audiences

We built it for devs, but our admins were all over it!

End-users were not long behind

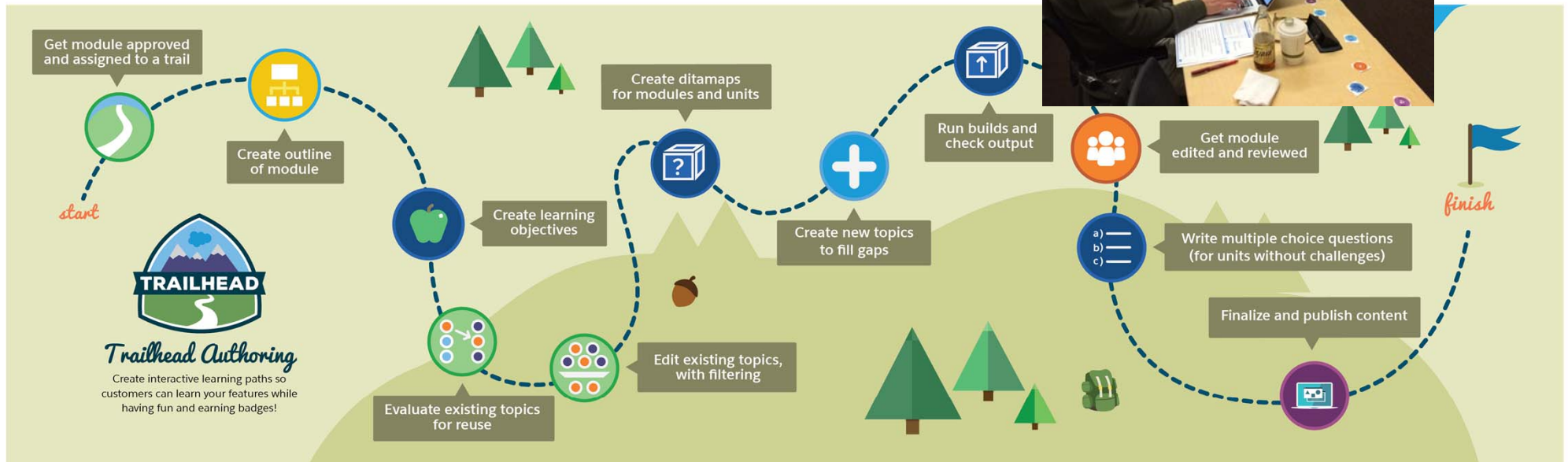
### Authoring model

Experts in the feature area are better qualified than writers just learning it themselves

Product managers were eager to drive adoption to their features

# All writers are Trailhead writers

## Trailhead Live training





# More Success

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# Becoming a brand

Trailhead continues to grow

The data tells the story:

40%

Month-over-month growth in active users

50%

Month-over-month growth in badges earned

100+

Customer blogs raving about Trailhead



## Trailhead by the numbers



Content  
**XX**  
New modules created since launch



Adoption  
**XX,XXX**  
Badges earned

# What's next?

More reuse

Trailhead-first authoring  
Collaborative content creation



More interactivity

Role-based UI  
Customizable trails



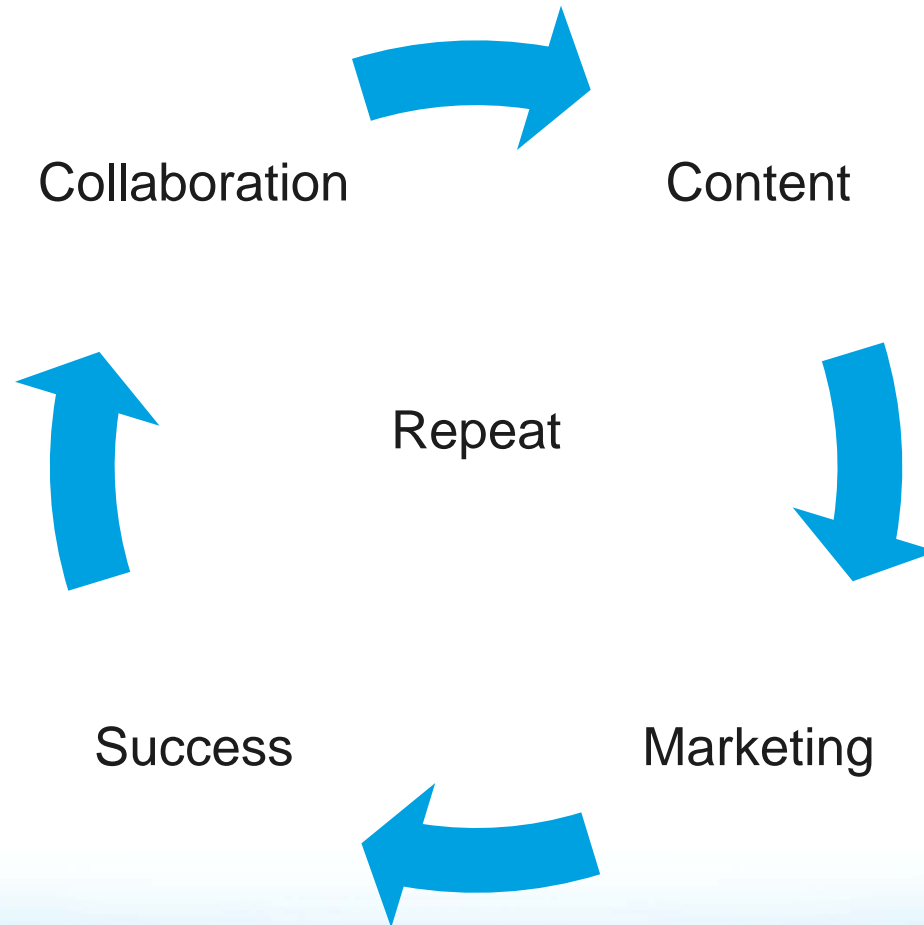
More marketing automation

Evolving brand  
Market segmentation



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## What have you learned?





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**Thank you**