Pre-Workshop Checklist

Congrats! You are on your way to hosting a Salesforce Customer 360 Platform Workshop. We’ve created the checklist below to help you stay on track as you plan and prepare for your workshop. We know you’re already itching to dig in, so first things first – go to the link below to sign up and access a scratch org for this workshop.

CREATE YOUR ORG > https://platform-workshops.herokuapp.com/adoption

*Scratch orgs expire after 24 hours. Feel free to create as many scratch orgs as you need to practice, with a new one created the day of your workshop.

☐ 4+ weeks out

• Choose a date and venue for your workshop.
• Create and send invitations – include your workshop topic, date, time, and location.
• Promote your workshop on social media.

*Pro tip: Use the provided promo card image to create your invite and promote on social media.

☐ 3 weeks out

• Practice your workshop: You can sign up to access the scratch org for your workshop here.  
  > https://platform-workshops.herokuapp.com/adoption

☐ 2 weeks out

• Fill out your swag request form to get fun gear to share with your attendees.*  
  > https://bit.ly/2LJ6x27 [*5+ attendees required]

☐ 1 week out

• Send a reminder email to your attendees.

☐ Day of

• Send an email to your attendees with the link to the Lightning Adoption Workshop Launchpad, where attendees will go to sign up and access their scratch org.  
  > https://platform-workshops.herokuapp.com/adoption

  Pro tip: Ask your attendees to sign up and load their scratch org on their computer no more than 24 hours before the workshop. This will save time at the beginning of the workshop.

• If you’re running this workshop for a large group and want to avoid having to wait for orgs to load when your workshop begins, use the poolbot to spin up many orgs at least a few hours in advance of your workshop.

• Have fun and share photos from your workshop! Include: #LightningNow #WorkshopInABox.

Have questions or feedback about this workshop, running your own, or the Workshop-In-A-Box program in general? Please reach out here: https://bit.ly/2MyImAF.
Workshop Guide

Improve Adoption with User Engagement Platform Tools
Abstract

Use the new User Engagement platform to engage and encourage your users to stay in Lightning Experience.

Launch URL

https://platform-workshops.herokuapp.com/adoption

Introduction

You are well on your Lightning Experience journey and at least all of your users have access to what Salesforce raves about in Lightning Experience. Now, you want your users to STAY in Lightning Experience and appreciate all the goodness it has to offer. The new User Engagement Platform enables you to provide assistance in the app to help keep your users from switching to Salesforce Classic.

Part 1: Why are you switching?

So what do we have going on here? Our Sales users have access to Lightning Experience but we know they don’t always stay in Lightning. No sweat, we will make sure we understand why they are switching back and forth.

From your newly created org, lets first create a public chatter group to talk about Lightning in our org. We can share best practices here and get people really excited but we also want users to be able to come here to give us feedback.

1. From the App Launcher, type in “Groups”.
2. Select “Groups” from the options displayed.
3. Select the New Action on the right side of the list view.
   a. Name: Lightning Experience Tidbits
b. **Description:** Tell us how your transition to Lightning is going and we will share best practices.

c. **Access Type:** Public

4. Select “**Save & Next**”.

5. Select “**Next**” as we won’t upload a picture here.

6. Select “**Done**”.

This is great! Now we have a group to share and get feedback but let’s be proactive about getting what we want. We can automatically collect feedback when one of our users switches to Salesforce Classic. Let’s turn this on in Setup:

1. From the **Setup gear icon** in the right hand corner, select “**Setup**”.

2. In the **Quick Find** window, type “**User Engagement**”.

3. Select “**Adoption Assistance**”.

4. Turn on “**Switch to Salesforce Classic User Feedback Form**”.
   
   a. Select “**Show every time the user switches to Salesforce Classic**”.
   
   b. **Chatter Group:** Lightning Experience Tidbits.

5. Select “**Activate**”.

Let’s try this out:

1. Navigate to your profile and select “**Switch to Salesforce Classic**”.

2. When prompted, type in the window: “**Testing out feedback form**”.

3. Select “**Continue**”.

You will see our post in the Lightning Experience Tidbits group in your Chatter feed. We now will automatically get feedback each and every time someone switches to Salesforce Classic like magic!

But wait, we are now in Salesforce Classic. Oh we can’t stay here so let’s select the link to “Switch to Lightning Experience”.

**Part 2: Let’s help our users with our own help materials.**

We know that our sales people can sometimes forget what resources are available to them, but they are in luck. We can customize the Help Menu in Salesforce now to include information that resonates with them. Let’s customize our help menu to provide our sales people with some pertinent information for the sales process:

1. From the **Setup gear icon** in the right hand corner, select “**Setup**”
2. In the **Quick Find** window, type “**User Engagement**”.
3. Select “**Help Menu**”.
4. In the Section Title Label, enter “**Cloud9+ Sales Materials**”.
5. In the Resources section, **click on the pencil** and enter the following:
   a. Resource #1:
      i. **Label**: Inside Sales Call Script
      ii. **URL**: [https://sfdc.co/callscript](https://sfdc.co/callscript)
   b. Resource #2:
      i. **Label**: Inside Sales Best Practices
6. Select “**Save**”.
7. Scroll up to turn the Custom help menu toggle to “**On**”.

While we are here, you can review the other areas you can customize but we will leave them as is for now. Let’s take a look at our custom Help menu by selecting the **question mark icon**.
**Part 3: It’s time to really help our users out.**

Wouldn’t it be cool if you were able to provide your users with a few tidbits of information as they click through Lightning Experience? Well, it’s there and it is the third component to the User Engagement Platform! In-app messages give you the ability to place a help message on a Lightning page to give your user additional insight into what’s next or even provide extra help. To help customers get started Salesforce has even created the [In-App Guidance package](#) on the Appexchange which has been already downloaded into our orgs to help us finish up our User Engagement experience. Let’s take a look at what’s here:

Still in the User Engagement menu item, select **“In-App Guidance”**, you will notice 5 prompts have been created. There are 2 types of prompts:

- **Docked Prompt:** Stays in the bottom right corner
  - Click on the action arrow beside the **“Chatter Profile Tips”** prompt and select **Preview** to see this prompt type.

- **Floating Prompt:** Stays in the position of your choice until the user navigates away
  - Click on the action arrow beside the **“Create Shortcuts to Favorite Pages”** prompt and select **Preview** to see this prompt type.

Now, let’s create our own prompt:

1. Select **“Add Prompt”**.
2. Select **“Open Authoring Bar”**.
3. Select **“Add Prompt”** and select **Next**.
4. For **Type**, select **“Floating”** and select **Next**.
5. For **Position**, select **“Top Center”** and select **Next**.
6. For **Permissions**, select, **“Everyone”** and select **Next**.
7. For **Content**, enter the following and select **Next**:
   a. **Title**: <= Update Your Goal (Quota)!
   b. **Body**: The Quarterly Performance Chart allows you to track YOUR performance. Update your Goal Now!
   c. **Dismiss Button Label**: Update Now
8. For **Schedule**:
   a. **Date Range (Start Date):** (ENTER TODAY's DATE)
   b. **Frequency**:
      i. **Times to show:** 12
      ii. **Days between:** 30

9. For **Details**:
   a. **Prompt Name:** Quota Update
   b. **API Name:** QuotaUpdate
   c. **Description:** Advises to update quota on quarterly performance chart

10. Save & Preview.

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**Conclusion**

Now you have a prompt that reminds the reps to enter their goal every month. Can you think of other In-App Guidance prompts to add? Try one out on your own! For more details on In-App Guidance, please visit [Help & Training](#).