



User Engagement Playbook

This playbook is a result of collaboration with Improved Apps, Customers and Salesforce Success Managers, covering successful adoption tactics from 100's of successful Salesforce and Improved Apps deployments.

THE USER ENGAGEMENT PEOPLE



ABOUT THIS PLAYBOOK

This Playbook **IS** designed to be a...



- useful starting point for anyone dealing with adoption issues
- helpful guide for digital adoption legends, dove-tailed in your overall [digital adoption plan](#)
- collection of the top five plays, to help drive your digital adoption

The Playbook is **NOT** meant to be a...



- replacement for running a [digital adoption plan](#)
- comprehensive instruction manual
- list of all relevant content or training on a particular topic



“We have to put the user first now, more than ever”

Simon Thompson, CEO, Improved Apps

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OVERVIEW

Salesforce.com invests a significant amount of money ensuring its Customer facing teams are equipped with the right knowledge, expertise and tools, to ensure Customer satisfaction. In any given month they will spend a lot of time talking about new features, best practice, roadmaps, strategy - and trying to get exec alignment and support from your business. However without adoption we know this sometimes falls on deaf ears.

We also know that user adoption is a complex issue, dependent on both individual and organisational performance. However, old approaches aren't working anymore. Effective user adoption is about getting people to change their behaviour to use their applications regularly and consistently to do their jobs more proficiently and they will only do that if there is something in it for them.

It's all about in-app communication (Chatter combined with [Improved NoticeBoard](#)) and quick access to context aware help & training ([Improved Help](#)), to help users develop new work habits and to keep them going - day after day, after day - to realise the potential in your Customer's employees. We have to remove any organisational barriers that prevent Customers from using the applications. And that is about alignment and focus on how different groups use their applications to make sure the Customer is achieving the desired business goals.



Most Customers need to evolve fast. The Salesforce platform is perfect to support business strategies, key fiscal year priorities and their desired pace for change. Disruptive and radical change was enabled in the early Salesforce promise of **'No software'** offering maximum agility. However, most have now reached the situation where Salesforce is in complete lockdown.

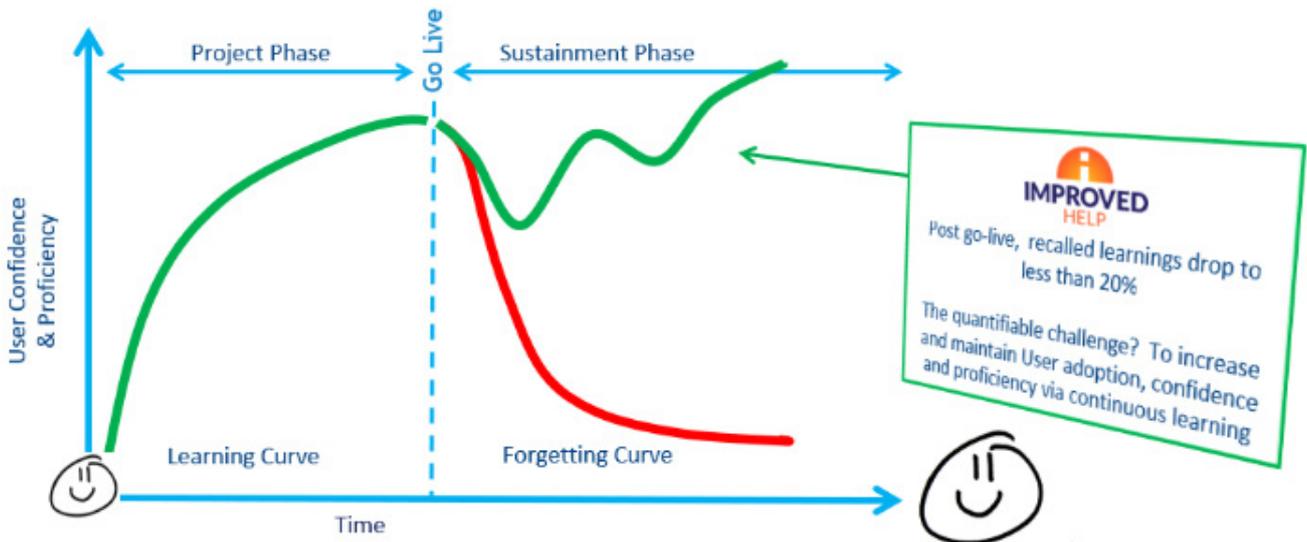


LET THE BUSINESS REGAIN CONTROL

Improved Apps and the Customer need to work together to help realise the value of the Salesforce investment, by bringing the flexibility back to the business. With a little education on Improved Apps solutions, you will be able to take your business on a new journey - a journey where they, the business, can once again take ownership, monitor real-time engagement through your own dashboards, and drive a continual improvement.

We achieve this by providing your users with access to critical content in context, allowing your end-users to 'Dip in and out' as and when they need to, minimising any wasting of time - for any interrupted colleagues' or their own - searching for what they need.

Giving the users one of the most important things back into their lives...TIME.



This playbook enables a continuous learning environment that will drive adoption through the roof and put a smile back on your executives and users' faces.

You'll be able to review the dashboards to determine how best to engage going forward and offer best practice guidance with this increased knowledge in hand.



MOVING THE ADOPTION NEEDLE

So how do we move the ADOPTION needle by using this Playbook?

This is a two month project, channeling the knowledge of you and your peers, together with a little bit of Improved Apps technology and guidance where needed.

There are just FIVE key plays...

The five key plays below are designed to assist you in our joint mission to drive adoption within your business and move each orgs adoption needles in the right direction. The aim is to engage with your users and make them self-sufficient as soon as possible in a matter of hours or days. These plays compliment your existing salesforce projects and Improved Apps should become part of your DNA to increase utilisation.

PLAY 1 - SEEK EXECUTIVE BUY-IN

Ensure all initiatives are aligned with and driven by current critical business goals. (We can easily get these priorities from the company's financial results or investment pages or talk to your key contacts within the business). We explain what continuous improvement and continuous learning looks like, why it's more important and easier than ever to put the user first. Identify a champion and key stakeholder - it's cheaper and easier to get things right using salesforce technology, than it is to create a project team to assess and switch to another platform. We take the key stakeholder through the [Digital Adoption Plan Checklist](#), and plan the engagement. Define clear success criteria based on tangible metrics, agree what happens when successful.

PLAY 2 - DRAW A LINE IN THE SAND (NOW!)

What does the org look like? Use Salesforce Optimizer, then assess the results with your Improved Apps. Communicate what's going on and why future changes are imminent - we work with key users to gather early feedback / current sentiment / ideas from super users. Run an [end user survey](#) asap (to all salesforce users) and analyse the feedback. Start to demonstrate that the business is listening. Communicate success via Chatter (for nice to know information) and Improved NoticeBoard (for all critical must do, must act information - see Play 4).



THE BATTLE PLAN - STRATEGY FOR SUCCESSFUL USER ENGAGEMENT

PLAY 3 - FOCUS ON THE END USER EXPERIENCE

Users should be at the heart of this project, they should feel in control and listened to - don't make assumptions, we get stuck in and include a few key users. Simplify page layouts and suggest removing any under-utilised items highlighted from the Salesforce Optimizer Report - De-clutter pages and implement a continuous learning experience by implementing Improved Help (see Play 4)...Through the analysis gleaned, focus on 10-15 key fields on all key Objects from areas of the application where users say or where data errors or support calls suggest they need assistance.

PLAY 4 - TAKE ADVANTAGE OF NATIVE TECHNOLOGY

Improved Apps will support the rollout and training - Implement [Improved Help](#) & [Improved NoticeBoard](#). Alert Users of any new changes (see Play 2), gather feedback from the frontline and adopt a continuous improvement programme. Prove along the way to users that they are being heard, they are making vital contributions and changes are a direct result of their interactions (feedback and sentiment) from within their applications. Optionally enable SF1 Mobile Help, so any of this context aware content is available from any device, anywhere. Initially provide very simple, easy to consume answers in the Help Topics to help remind users of what to do and why. Add signposting to existing content so users can go on a journey to learn more. Think of using Reading lists for process help.

PLAY 5 - LEVERAGE YOUR SALESFORCE CSG TEAM

We use everything we know and have been taught to maximum benefit. We ensure the salesforce Account team are aware of this 'Moving the Adoption Needle' project. Take onboard any guidance from our Customers, users and execs - and engage the right people. We have an arsenal of great resources out there (internal resources, training, Trailhead, Success community) to emphasise that the business team really does care (Ohana). We help you look out for opportunities to engage your Sales & Services teams to realise increased value of the investment in salesforce.com.

KEY METRICS MUST BE AGREED AND IN PLAY

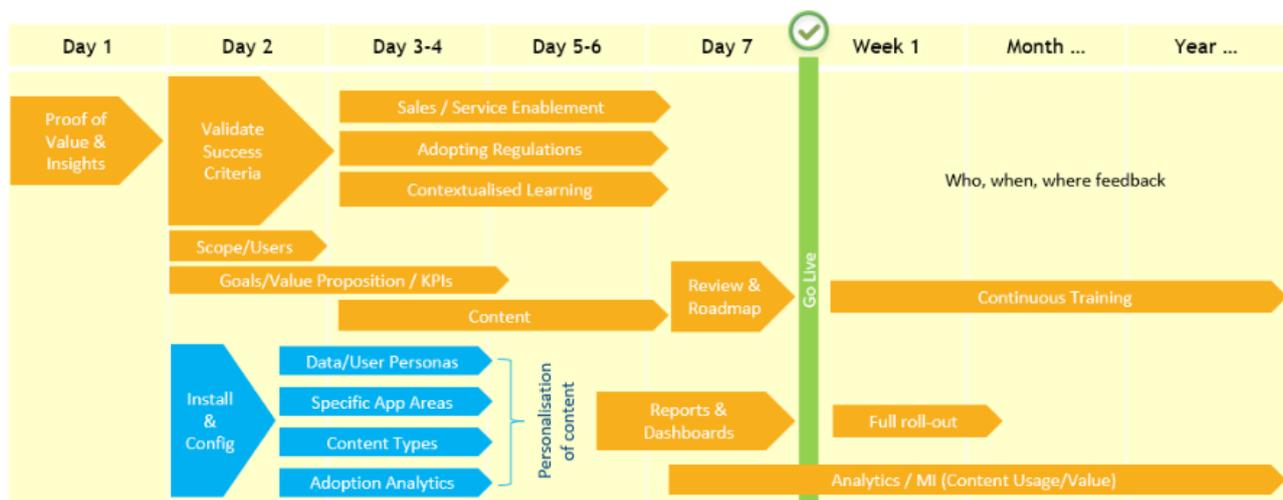
Use the dashboards to monitor 'before' (via screenshots), during this two month project and with exec reviews, to demonstrate adoption improvement. Use the Improved Apps packaged dashboards to drive your conversations with the business and move into a continual improvement programme.



IMPLEMENTATION PROJECT TIMELINE

Improved Apps installation from the AppExchange takes minutes per app, with setup taking approx. 60 minutes. Either app may be rolled out to a controlled set of users or all users within an Org. It is recommended that this project be installed into a production Org, to ensure minimal disruption for any participating users and team members.. Engage Improved Apps early, to get through Infosec or address any technical concerns.

A typical 'Moving the Adoption Needle' project roll-out plan is below. (Tasks don't need to be whole days)



Exporting all the content is easy at any point. 'Content Packs' can be created to migrate reusable content into other Orgs or be used to fast-track other 'Moving the Adoption Needle' projects.

WHAT NEXT?

Once we have demonstrated significant improvement, which can usually be achieved long before the end of the two month project, please introduce your business to Improved Apps again to discuss any commercials - to allow your business to maintain self-sufficiency and keep the momentum going.

GET IN TOUCH

Feel free to [get in touch](#) with our digital adoption legends to talk through your specific scenarios. Contact information is below...



USEFUL RESOURCES FROM IMPROVED APPS

SALESFORCE OPTIMIZER

Salesforce Optimizer ([Video Link](#)) analyzes your implementation to determine ways that you can simplify your customisations and drive adoption of features. Optimizer recommends ways to improve features in the Salesforce implementation. However, Optimizer analyzes only a subset of features across Salesforce. Optimizer has access only to the Org's metadata. To run Optimizer in a chosen Org goto Setup and search for 'optimizer', then follow the instructions. Run this quarterly, as new enhancements are off the release schedule.

IMPROVED APPS OPTIMIZER REPORT CONSIDERATIONS

Use the guidance carefully...the bigger the Org, the more complex the use cases, and larger the number of users potentially affected by any changes - all of which could bring risk or even slow any progress down. So, focus on the end-user for maximum results as the initial priority. Remove unwanted/under-utilised fields from page layouts as a first step rather than deleting them entirely and provide in-app contextual help and training.

IMPROVED CHANGE MANAGEMENT OVERVIEW

Helping customers get the most out of their Salesforce investment. "Change is the only constant in life" (Heraclitus). Implementing, enabling and changing systems in the delivery of Internet Solutions (SaaS) create unnecessary issues. Is it no different to any other systems change challenge? [Read More...](#)

CONTEXT IS KING

Improved Apps is a leader in the delivery of Enterprise Success Planning Solutions. Success enablement requires that we must first define what success means in the context of our enterprise users and their applications - and then proactively promote those things that do and avoid things that do not contribute to that success (i.e stop enabling failure!) . This is then supplemented by active and timely measurement and Reporting. [Read More...](#)

ENTERPRISE SUCCESS PLANNING

Delivering the sixth-sense you have always wanted to ensure your Salesforce solution is optimised for end-user success and it is readily adopted. [Read More...](#)

THE BATTLE FOR DIGITAL ADOPTION

Gone are the heroic battles for queen and country. The new battle, happening right now, in every industry, across the globe, is for Digital Adoption. [Read more...](#)



USEFUL RESOURCES FROM IMPROVED APPS

SUCCESS PLANNING AND DELIVERY

Understand User behaviour - find the issues, manage them proactively, increase adoption and reduce support costs. An Early-Warning System out-of-the-box. [Read More...](#)

IMPROVED HELP FOR SALESFORCE OVERVIEW

Your users' in-app coach for best practice, process compliance & embedded learning, Help and Training. Help in the right place, at the right time, for the right user. [Read More...](#)

IMPROVED NOTICEBOARD FOR SALESFORCE OVERVIEW

Critical Communications & Compliance. Right message, to the right people, at the right time. [Read More...](#)

IMPROVED APPS _ SUCCESS HEALTH CHECK

Is your existing Salesforce implementation suboptimal or misaligned with your current business strategy? Are your users struggling or complaining that Salesforce is not helping them? Does your organisation need to implement new business strategies or redesign current business processes with insufficient resources? Are declining training and IT budgets limiting your ability to fund enhancements and Improvements? [Read More...](#)

LIQUID WORKFORCE BY ACCENTURE

Building the workforce. for today's digital demands. Companies are investing in the tools and technologies they need to keep pace with constant change in the digital era. But to achieve their ambitious goals, leaders are refocusing on an often overlooked factor: the workforce. [Read More...](#)

Research by Gallup has shown that companies with highly engaged employees outperform their competitors by 147%.

About the author of this document: **Simon Thompson - CEO / Co-founder (Improved Apps)** [LinkedIn](#) - Joined Salesforce.com back in January 2007, worked with Salesforce Customers ever since...Held many senior Customers Success roles since 2010. Loves working with the Salesforce technology and people for mutual success, always happy to take a call for a chat.



About IMPROVED APPS

Improved Apps Ltd was founded in 2011 to deliver innovative applications that drive Salesforce adoption through ease of use and an enhanced user experience. We support customers' Salesforce cloud strategies - which are about creating a unified experience across:

- Standard Salesforce applications - CRM, Console, Communities, and mobile
- Enterprise applications built on the Salesforce platform
- Third-party applications bought through the AppExchange
- Applications that are non-native but integrated for access by Salesforce users

Our Improved Apps are born out of many years of real-world Salesforce.com experience - implementations, developments, training, and our own day-to-day administration and usage. Our applications are all 100% native salesforce - guaranteed and trusted.

Rachel Dance
Digital Adoption
Legend

Simon Thompson
CEO/Co-Founder
Improved Apps

Nadio Granata
Co-Founder at
Age of Human



Improved Apps are proud members of BIG1 Business For Good and contribute to the global community's next step in ending poverty, fighting inequality and injustice, and tackling climate change by 2030.

Actions and achievements within our business impact sustainable development goals for causes close to our heart. For example, every 'Turnaround Service' engagement from Improved Apps, trees are planted and we help educate the young and deprived around the world, with free education, water and materials.



THE USER ENGAGEMENT PEOPLE

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