Nonprofit DREAMIN

How I Empowered My Users With Personalised, Skills Based Training Pathways

Lauren Weller

Thank You to our Champion Sponsors

Nonprofit DREAMIN

ARKUS

ATTAIN®

CoastalCloud

demandblue
ON DEMAND SERVICES FOR SALESFORCE

exponent partners

ISIMIO SCHEDULING
by Kruvi Solutions

hopin

mogli™

Own{backup}

PHONE 2 ACTION

LLAMASITE
Imagine. Build. Launch.

SERĈANTE

National Children's Bureau (NCB)

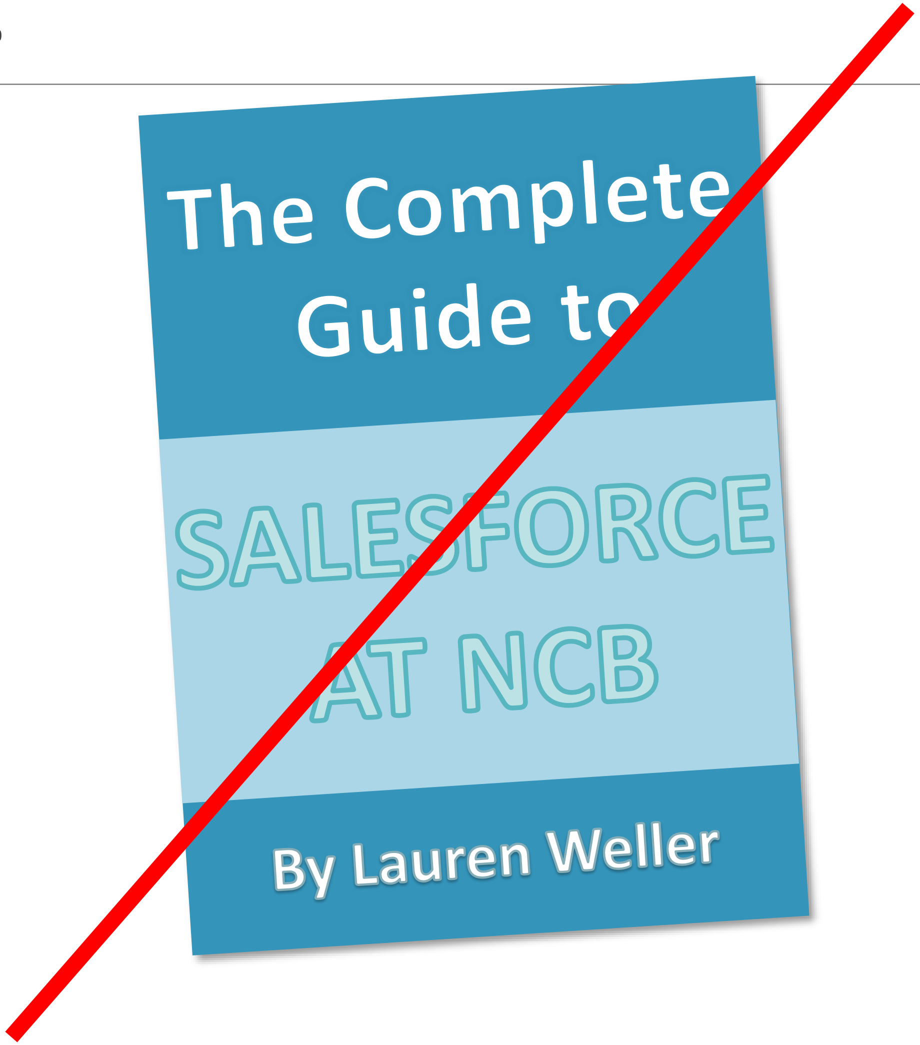
- Our mission is to build a better childhood for every child:
  - Use evidence to influence policy change
  - Bring people and organisations together
  - Develop the workforce
  - Amplify children and young people's voices
- Approx. 110 staff across three sites
- Limited use of Salesforce for several years but undertook a significant redevelopment and relaunch in 2019/20
- One part-time (0.8 FTE) Admin responsible for all things Salesforce

Setting the scene

- A new system with new processes to learn
- Staff feeling towards Salesforce negative & confidence v.low
- Everyone overworked and under-resourced (always)
- Huge variation of training needs between and within teams

‘Full user adoption and confidence’?

Not this…



I did want…

- Staff to take responsibility for their own learning, minimising my input
- Staff to have a deep understanding of our system and be able to use it without following step by step guidance
- To support staff's professional development by offering valuable skills
- A tailored, efficient solution that enabled staff to focus on the training they need for their role
- A sustainable, flexible solution that would grow with our system

My 5 point plan

1. Identify which tasks Salesforce is used for
2. Identify what skills are needed to perform each task
3. Set up a method for users to evaluate their skills
4. Write and deliver modular training that corresponds to tasks and skills
5. Embed in HR practices for induction and evaluation for long term sustainability

1. Identify Salesforce Tasks

- My top FAQ was ‘*what do I use Salesforce for?*’
- Staff needed help differentiating Salesforce from our other digital systems (e.g. finance, HR,) and locating it within their day to day work
- Each task is accompanied by a short (2 min) screen capture that demonstrates how the task works in Salesforce
- These videos are compiled into a self-directed introductory eLearning course

NCB’s ‘10 Key Tasks’

1. Manage accounts and contacts
2. Organise contacts into groups
3. Record activities/interventions
4. Send mass emails
5. Track funding bids
6. Process income
7. Associate Contracts & Task Orders
8. Retrieve data via reports
9. Monitor data via dashboards
10. Share feedback via cases

2. Identify each task's skills

- Skills are organised into core, advanced and expert
  - **Core** – all staff should have these
  - **Advanced** – some staff should have these if relevant to their role
  - **Expert** – a few staff (Champions) will have these

Skill	Salesforce 10 tasks	Level
I can view/create relationships between Accounts using hierarchies	Managing stakeholder data	Core
I can create/update an Account record	Managing stakeholder data	Core
I can create/update a Contact record	Managing stakeholder data	Core
I can view/create relationships between Contacts and Accounts using Affiliations	Managing stakeholder data	Core
I can log a call, meeting or task	Managing stakeholder data	Core
I can edit multiple records at a time using inline edit	Managing stakeholder data	Advanced
I can send an email to an individual contact	Managing stakeholder data	Advanced
I can merge duplicate Accounts	Managing stakeholder data	Expert
I can merge duplicate Contacts	Managing stakeholder data	Expert
I can mass upload, upsert and delete data	Managing stakeholder data	Expert
I can delete records	Managing stakeholder data	Expert

3. Users evaluate their skills

- I used a simple FormAssembly form
- After they submit, users are emailed a copy of their response
- In the future I might create a custom object and link the form to it, so the data is held in Salesforce

Managing stakeholder data skills

You said this **is** part of your role.

Core (all staff)

	I have this skill	I don't have this skill
I can create/update an Account record	☐	☐
I can create/update a Contact record	☐	☐
I can view/create relationships between Accounts using hierarchies	☐	☐
I can view/create relationships between Contacts and Accounts using Affiliations	☐	☐
I can log a call or meeting	☐	☐

Advanced (some staff)

	I have this skill	I don't have this skill	I don't need this skill
I can edit multiple records at a time using inline edit	☐	☐	☐
I can send an email to an individual contact	☐	☐	☐

Expert (a few staff)

	I have this skill	I don't have this skill	I don't need this skill
I can merge duplicate Accounts	☐	☐	☐
I can merge duplicate Contacts	☐	☐	☐
I can delete records	☐	☐	☐
I can mass upload, upsert and delete data	☐	☐	☐

4. Write modular training corresponding to tasks and skills

- I wrote 5 courses:
  - ‘Introduction to accessing SF’
  - 'Introduction to adding and retrieving data’
  - ‘Extending Core Skills’
  - ‘Processing income’
  - ‘Reporting’
- Courses are 2 hours long:
  - 1 hour presentation led
  - 1 hour hands on activities using the sandbox

Core 1 'Introduction to accessing Salesforce' will cover these skills:

Skill	NCB Task Area
I know which username to use to log in	Accessing Salesforce
I can log in to both the live and test environments	Accessing Salesforce
I can verify my email address when logging in from a new location for the first time	Accessing Salesforce
I can use the global search to find records	Accessing Salesforce
I can review responses to my Cases	Sharing Salesforce feedback/issues
I can add comments, including attachments, to my Cases	Sharing Salesforce feedback/issues
I can raise issues and send feedback by creating a Case	Sharing Salesforce feedback/issues
I can switch between pre-existing Lists	Organising stakeholder data
I know how to find records of events, projects, networks and communications	Recording NCB activities
I know how to view emails a Contact has received in the past	Sending emails to multiple recipients
I know how to find and view details of pipeline records	Tracking funding bids
I know how to view details of income received from a Contact or Account	Processing income
I know how to find records of Associates, their Contracts and Task Orders	Managing NCB Associates

5. Embed and sustain

- Completion of the introductory eLearning course and Training Needs Assessment are part of the HR induction process
- Periodically encourage staff to re-evaluate their needs
- Make training content continuously available – we have recordings of each course on our intranet and are working towards reproducing them as eLearning courses

Have I escaped the guidebook?

Not quite…

- Some processes, such as raising invoices, are more complicated/sensitive so I do have a few ‘process guides’ to support this
- They are relatively light touch and instruct what to do, rather than how

Questions?

Thank you for coming

Please return to the Reception area (the icon is at the top left of your screen) to see your next networking, collaboration and learning options!

#nonprofitdreamin